

**The appraisal of potential leader identity triggers and the impact on managerial
leader identity over time**

by

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Submitted in fulfilment of the requirements for the degree
of Doctor of Philosophy
at the Gordon Institute of Business Science,
University of Pretoria

May 2024

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Declaration

I, Sarah Babb, declare that the thesis, which I hereby submit for the degree of Doctor of Philosophy at the University of Pretoria, is my own work and has not previously been submitted by me for a degree at this or any other tertiary institution.

Signature:

Date:

Ethics Statement

The author, whose name appears on the title page of this thesis, has obtained, for the research described in this work, the applicable research ethics approval. The author declares that she has observed the ethical standards required in terms of the University of Pretoria's Code of ethics for researchers and the Policy guidelines for responsible research.

Acknowledgements

I would like to thank all those who participated in this study, those who made this thesis possible, and those who patiently supported me from the side-lines. This study would not have been possible without you.

Margarethe Booysen, I cannot thank you enough for picking up the mantle to be my peer reviewer. I so appreciated your enthusiasm and willingness to discuss the research and findings ad nauseum which kept me going through the tough times and some very late nights.

Prof Margie Sutherland, thank you for your getting me off the starting blocks so well and for tireless patience with me and support and care over this journey. Prof Louise Whittaker, thank you for your insightful and encouraging feedback which helped bring this thesis over the line.

Thank you to the GIBS team for your contributions to the thesis and support over the journey: Prof Helena Barnard for your encouragement and clear focused feedback and Dr Viv Spooner for your inspiration and practical advice. Mamello Ngwenya and Mpho Alaardt thank you for your seamless programme coordination.

The greatest thanks to my friends and family who supported me and to my wonderful daughter who showed staggering patience and wonder at me spending so many weekends and nights on this research. May this inspire you to not give up on pursuing your dreams.

Abstract

Managers in business organisations are confronted daily by challenges of a fast-changing world. Managers hold multiple identities, one of which may be a leader identity. Despite so many potential identity triggers, leader identity development is not yet guaranteed for all managers. This is important as it has been found in leader identity scholarship that managers who hold a leader identity are more likely to be motivated, to learn and to act confidently as a leader which would better equip them to lead.

This study explored the phenomenon of the appraisal by managers of potential identity triggers and the impact this has on leader identity development over time. A qualitative study was conducted interviewing four managers over an eight-month period using the methodology of longitudinal interpretative phenomenological analysis. This allowed for a nuanced rich understanding of the phenomenon to be reached.

The study offers six novel theoretical contributions to the extant scholarship on leader identity development of managers. Firstly, through offering a framework demonstrating how the dynamic interplay in the inter identity network, particularly between the self-identity and the leader identity, impacts leader identity development. Secondly, the self-identity acts as a buffer and filters out potential leader identity triggers, limiting the potential for leader identity development.

Thirdly, the past self-identity acts as a constraint or motivator on leader identity development. Fourthly, leader identity development occurs when the narrative shift finds an alignment and synergy with the self-identity. Fifth, a leader identity narrative shift does not automatically lead to identity enactment. Enactment requires the influences of agency and locus of control, learning goal orientation and clarity of aspirational leader identity. Sixth, leader identity development cannot be accurately interpreted at single time points and is better gauged over a longer period. Responses vary over time and may be expansionary and/or diminishing at different time points.

This study provides practical contributions to the institutions and practitioners and professionals who are dedicated to the field of leader development. The findings also support managers to better understand their own leader identity development to better engage in fast-changing world.

Keywords

Leader identity, leader identity development, inter personal identity network, inter identity work, leader identity trigger appraisal, self-identity

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Chapter 1. Introduction

1.1. The need for adaptive leadership

The dynamic and complex nature of the business organisational environment is in many ways linked to the constant change that the business environment is subject to. The significant changes within the business environment, largely due to continuously evolving technological advances and increased globalisation, are described by Englehardt & Simmons (2002) as “rapid and relentless” forcing organisations to source and secure ways in which to respond to a rapidly changing, volatile and uncertain environment.

Such moves require adaptive leadership. “One of the biggest challenges facing leaders today is the need to position and to enable organisations and people for adaptability in the face of increasingly dynamic and demanding environments” (Uhl-Bien & Arena, 2018, p. 89). Consequently, leaders are seeking to change their ways of leading in a more dynamic world (Mumford et al., 2000). Adaptive leadership demands an adaptive identity of managers, who hold the sub-identity of leader (Yukl & Mahsud, 2010, p. 81). Leadership has moved beyond merely occupying a formal role and job to becoming and being influential over (Ibarra et al., 2014, p. 285) the actions and direction of teams and organisations, carrying the meaning and identity of organisations and organisational change (Dinh et al., 2014; Reicher et al., 2005; Ybema et al., 2009).

Beech (2017, p. 357) states that “the macro socio-economic environment is one which brings demanding challenges to people’s identities at work”. Geo-political, social, environmental, and technological disruption impacts the nature of work and how businesses are organised (Petriglieri, Ashford, & Wrzesniewski, 2019; Wittman, 2019; Yukl & Mahsud, 2010) and subsequently pose challenges to navigate and lead in this increasingly complex environment. These challenges often constitute threats to individual identities (Petriglieri, 2011, p. 641). Identity issues have come to the fore as identity work is triggered amongst organisational members alongside the organisational changes and organisational challenges (Brown, 2019; Järventie-Thesleff & Tienari, 2016).

Identities are increasingly challenged by the environment, and this leads to extensive identity work by leaders. The challenge too is how do leaders develop their identity, when constantly under threat, and also how to develop a leader identity that enables leaders to be adaptive to adapt to the demands of the context.

1.2. Middle management under threat and identity work

Middle managers, in particular, tend to experience insecurity in their role and identities (Brown & Coupland, 2015; Linstead & Thomas, 2002). Managers are often responsible for reconfiguring their areas of responsibility to be more responsive to change: restructuring to have fewer layers, to be less hierarchical to enable decision-making to be responsive and distributed.

“Significantly, identity work, which was once seen as having only ‘vague’ influence (Alvesson and Willmott 2002, p. 625), is now recognized to be implicated in a host of individual and collective processes and outcomes” (Brown, 2017, p. 299). How managers view and experience their identities matters to the organisation as their leader identity impacts the way in which they lead. As senior managers respond to the challenges of the business and organisational environment, they also change their way of working and organisational structures. Middle managers have to adapt to these changes from the top and translate these changes to subordinates. The complexity and demanding nature of these multidimensional changes often demands identity work of middle managers. Middle managers are simultaneously required to respond to a changing environment, create change within their own area of responsibility and lead and manage change processes for their subordinates requiring the fulfilment of various roles that is reflected in the multiple identities of middle managers. As the identity demands increase, so too are the multiple identities subjected to identity work in a myriad of ways.

A middle manager holds multiple identities simultaneously, including those of a manager, leader, follower, member of an organisation as well as carrying a social identity amongst others. These sub-identities are nested in the overarching self-identity (Ashforth & Mael, 1989; Atewologun et al., 2017; Brown, 2017; Järventie-Thesleff & Tienari, 2016; Reicher et al., 2005).

Leader identity is one of the sub-identities that middle-managers hold, and this identity becomes salient when an individual actively engages in identity work around this sub-identity. Gjerde and Alvesson (2020) find that middle managers experience their roles as being ‘sandwiched’ between senior managers and followers, and that this causes them to shift between and resist managerial identity and leader identity (Harding et al., 2014). These multiple identities stretch middle managers between often times competing interests of their

managers, followers, and other stakeholders of their respective organisations (Epitropaki et al., 2017; Thomas & Linstead, 2002). Middle managers are often required to navigate identity transitions and engage in identity work and are prone to experiencing a pull between their professional identity, self-identity, managerial identity, and leader identity (Gjerde & Alvesson, 2020). This impacts the choices and behaviours of middle managers and is critical to understand as it goes to the core of how they operate. There are many factors which could trigger middle managers to consider their identity, and these are summarised in Figure 1 below.



Figure 1
Middle Manager Potential Identity Triggers (authors summary of the factors found in the literature)

1.3. Leader identity development as area for empirical research

The importance of understanding identity, multiple identities and identity work has been recognised in various bodies of literature (Petriglieri et al., 2019) and there are now calls to build a comprehensive understanding of identity dynamics in organisations (Caza, Vough, et al., 2018). This need has been linked to the changing business and organisational environment and there have been specific calls for the further exploration of identity change adaptiveness (Wittman, 2019). These changing environments and associated demands require a focus on advancing scholarship on leadership practices and phenomena such as

identity development facing identity threat (Day & Harrison, 2007; Epitropaki et al., 2017; Petriglieri, 2011). As such, there is widespread scholarly recognition of the need for expanding theory building and conducting empirical research on identities and identity construction issues in organisational contexts (Alvesson & Willmott, 2002; Brown, 2019).

In addition, there is a need to explore the dynamic interplay between multiple sub-identities that in turn exchange with the self-identity. Scholars note frequently that people work on different identities at different times, but the temporal relationships between these processes of identity work, and the trade-offs and sacrifices ... that may accompany these choices are virtually unexplored (Brown, 2017). "Future research on multiple identities should focus on deepening our understanding of the interaction between different work-related identities. In addition, as with many other review categories, more research that adopt a dynamic perspective on multiple identities is needed" (Miscenko & Day, 2015, p.7).

Few studies have explored the relationship between work and personal identities (Kreiner et al., 2006b) and between different identities such as social identification and others, but there are even fewer which explore the dynamic interchange between identities and the impact of this over time (Miscenko & Day, 2015).

As stated previously, middle-managers, in particular, are required to be responsive to changing demands in terms of their leadership and management as they hold multiple identities simultaneously. The dynamics between the leader sub-identity and the manager sub-identity have been recognised by some scholars to result in antagonistic discourses (Clarke et al., 2009) which may even result in a sense of the manager losing the plot (Thomas & Linstead, 2002) and / or of defaulting to a manager identity over a leader identity (Carroll & Levy, 2008). The interplay of these dynamics overall, and with the self-identity is less understood (Alvesson & Robertson, 2006; Alvesson & Sveningsson, 2003b; Atewologun et al., 2017; Carroll & Levy, 2008; Corlett et al., 2017; Gjerde & Alvesson, 2020; Harding et al., 2014; Kreiner et al., 2006a; Thomas & Linstead, 2002).

Particularly in the context of an increasingly challenging environment leading to many organisational changes these too impact the role identity and identity dynamics, as the role of middle managers is brought to question and the identity of leader is also being challenged to be responsive to a constantly changing context and organisation. Even if the leader identity narrative is fantasy (Sveningsson & Larsson, 2006) or the 'extra-ordinization of the mundane' (Alvesson & Sveningsson, 2003b), leader identity remains prevalent amongst middle managers.

“Leadership is best understood in terms of identity” (Day & Harrison, 2007, p. 371). Leader identity development is a complex phenomenon which warrants further scholarly attention and a nuanced approach to research (Alvesson et al., 2008; Day et al., 2014; Day & Dragoni, 2015; Day & Harrison, 2007; Hammond et al., 2017; Ibarra, 2005; Ibarra et al., 2010; Lord & Hall, 2005; Miscenko et al., 2017). Empirical evidence on leader identity development is sparse (Middleton et al., 2019). Scholars have called for further research and empirical work on the wide-ranging theoretical frameworks and conceptual work on leader identity (Epitropaki et al., 2017; Kwok et al., 2018; Miscenko & Day, 2015).

Given the role played by identity it has sparked considerable interest and has become one of “the most popular topics in contemporary organizational studies” (Sveningsson & Alvesson, 2003, p. 1163) resulting in a substantial body of knowledge on leader identity (Ashforth et al., 2016; Collinson, 2003; Epitropaki et al., 2017). However, leader identity development scholarship is new in relation to the broader base of leadership research and theory, and although much has been discovered there is still much to learn (Day et al., 2014).

What has been found is that leader identity plays an important role in the emergence of leadership attributed behaviour (DeRue & Ashford, 2010; Epitropaki et al., 2017; Ibarra et al., 2014). Leader identity asks the question: Who am I as a leader? (Alvesson & Sveningsson, 2003a) and this when integrated, builds confidence in an individual to seek out experiences to enact and develop that aspect of the self. Identity scholarship has confirmed these links between the identity development phenomenon, leadership development and leader effectiveness (Carroll & Levy, 2008; Day & Harrison, 2007; Hogg, 2001; Ibarra et al., 2010, 2014; Lord & Hall, 2005; Miscenko & Day, 2015; Petriglieri, 2011; van Knippenberg & Hogg, 2003).

In short, thinking of oneself as a leader is an important motivator for acting as a leader and further developing leadership related skills (Day & Harrison, 2007), thereby enhancing one’s impact (Kwok et al., 2018). As an individual develops a stronger leader identity so they feel more confident to act as leaders (Miscenko et al., 2017). When an individual sees themselves as a leader they are motivated to lead (Kark & Van Dijk, 2007) and they seek out leadership responsibilities and opportunities to develop leadership skills (Day & Harrison, 2007; DeRue & Ashford, 2010; Lord & Hall, 2005; van Knippenberg et al., 2005). A leader identity is important then to explore how it does evolve as a sub-identity of middle managers. Not all leadership behaviours are deemed as positive.

Leadership has not, however, always lived up to the upbeat and positive impact that it has been suggested it can deliver. Corruption, organisation collapses, and narcissism have failed the promise of leadership. Critical scholars question whether leaders do achieve positive outcomes, even though positive leadership remains the dominant discourse in scholarship (Alvesson, 2020). Scholars question the legitimacy of leaders and managers who have operated unethically and caused destruction of organisations and lost credibility in the general populace and employees. “There are indicators that large parts of the Western workforce is increasingly frustrated and disillusioned. Many scandals have been exposed, including financial crises and environmental problems, partly created by companies.” (Learmonth & Morrell, 2019)” cited in (Alvesson, 2020).

The identity of leaders is being challenged and research is particularly needed now on leader identity in organisations, and whether it can or does hold the promise of being able to guide organisations through the increasing challenges of our macro environment (Alvesson, 2020; Collinson, 2014; Knights & Clarke, 2017; Petriglieri, 2020; Petriglieri & Stein, 2012). Leadership guides organisations through challenges and this very leadership is enabled through a strong and salient and coherent leader identity. When identity is triggered the leader identity does not necessarily develop in a way that serves building leadership that is adaptive and responsive in these challenging times. We do need leader identities to develop in a way that it empowers leaders to guide organisations through these times.

The phenomenon of leader identity development over time is under-researched. Further studies are called for including an exploration of the influence of contextual factors and the phenomenon itself (Alvesson et al., 2008; Beech, 2011; Carroll & Levy, 2008; Day & Harrison, 2007; Ibarra et al., 2014; Lord & Hall, 2005; Miscenko et al., 2017; Petriglieri, 2011; van Knippenberg, van Knippenberg, De Cremer, & Hogg, 2004; Watson, 2008).

In sum as outlined above, it is important therefore to consider the multitude of factors which impact leader identity development of managers given the context of there being multiple potential triggers from a challenging context, the multitude of sub-identities and the interplay between these, as well as how these dynamics play out over time. The interplay between the many identity triggers and multiple sub-identities will impact a managers’ development of leader identity over time. In addition, given the changing context and organisational changes, the role of middle manager contains inherent triggers and tensions, and these tensions are also subject to change over time. Roles are constantly evolving, and this triggers identity work which involves trade-offs and changes in identity over time (Järventie-Thesleff & Tienari, 2016).

Alvesson and Willmott (2002) state that “specific events, encounters, transitions, experiences, surprises, as well as more constant strains, serve to heighten awareness of the constructed quality of self-identity and compel more concentrated identity work” (2002, p. 626). It is not the trigger per se that leads to a response, which could be expanded or defended identity. The context of business poses many potential threats and triggers as to how managers view themselves and their efficacy in these times. Yet some managers develop and expand their identity in the face of these challenges, whereas others retreat or guard against developing their identities.

Identity construction has been found to rely a great deal more on self-interpretation and appraisal of triggers in the organisation than on social interactions (Alvesson & Robertson, 2006). The way that a person interprets various contexts affects the identity development process and outcomes. The managers based on their appraisal could adopt an identity promotion focus or an identity prevention response when confronted with the same trigger (Kark & Van Dijk, 2007). However, “scant attention has been paid...to what happens in between an identity-threatening experience and its consequences – that is, the process by which individuals recognise an experience as identity-threatening, assess its impact, and decide how to respond to it” (Petriglieri, 2011, p. 642).

Further research is needed to understand whether individuals employ multiple responses simultaneously, attend to threats or triggers sequentially, or combine responses into a holistic strategy for dealing with various threats or triggers. An important and potentially generative avenue for future research is to investigate the impact of time on an individual’s response to identity threat (Petriglieri, 2011). “Why in different circumstances and at different times some people engage in identity work that leads to positive identification and become zealots for it, while others manifest dis-, schizo- or neutral identification is still largely mysterious” (Brown, 2015, p.32).

Multiple factors influence the phenomena of identity appraisal and responses by a manager and this identity development phenomenon warrants further attention as they may respond by protecting or developing their identity (Ashforth et al., 2016; Hammond et al., 2017; Petriglieri, 2011). Identity scholarship finds that individuals have a degree of agency in their identity construction (Bévort & Suddaby, 2016; Brown & Coupland, 2015) and many factors influence this agency. For example, an individual's learning goal orientation for example influences developmental trajectories (Day et al., 2014; Day & Sin, 2011) as does a person’s level of developmental readiness and motivation to lead, social support, source and strength of the

identity trigger, as well as one's thoughts, beliefs, emotions and actions (Epitropaki et al., 2017; Hammond et al., 2017; Mumford et al., 2000). The phenomenon of identity development is impacted by various factors and these are included in the author's depiction of a summary of these and the points of impact on the phenomenon below in Figure 2.

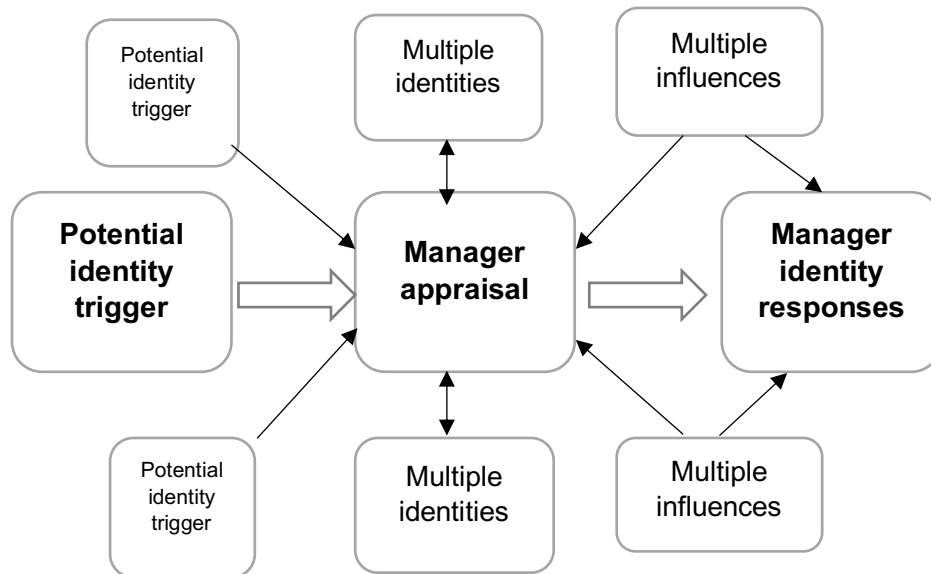


Figure 2

The Manager Identity Development Phenomenon in Response to Potential Identity Triggers (authors summary of factors at various points of impact on the phenomenon as found in the literature)

The more we understand more of the individual and contextual factors that influence identity appraisal, the more we will understand which individuals are likely to experience a positive change in their leader identity, and which may not (Day & Sin, 2011; Kwok et al., 2018). This could be the key to understanding why it is that some managers expand, and others defend or protect their identities. If we understand how it is that leader identity shifts across managers, we can better support enabling adaptive leader identities amongst managers. However, the interplay may undermine one or the other and needs further exploration on whether the integration into the overarching self-identity is influenced.

Leadership scholarship finds that leader (identity) development is inherently longitudinal (Day & Sin, 2011) involving a process by which leaders acquire relevant experiences, skills, behaviours, and knowledge over time (Lord & Hall, 2005). Yet there is little insight into the longitudinal processes of leader development (Day & Dragoni, 2015) and has not been addressed in any detail in the empirical literature (Miscenko et al., 2017). "The evidence suggests that only about 4% of the quantitatively oriented articles used longitudinal data ...the field lacks a deep foundation of research that investigates the process of identity and

identification over time” (Miscenko & Day, 2015, p. 23). Scholars note frequently that people work on different identities at different times, but the “temporal relationships between these processes of identity work, and the trade-offs and sacrifices ... that may accompany these choices are virtually unexplored” (Brown, 2015, p. 31).

Qualitative research is well suited to uncover the managers’ cognitive processes in identity development and to use an interpretive methodology that unpacks the rich experience of managers in this phenomenon so as to better understand the phenomenon itself, as well as the influences, appraisal and responses of leader identity in middle managers (Ashforth et al., 2016; Bardon et al., 2017; Bévort & Suddaby, 2016; Hammond et al., 2017; Kwok et al., 2018). “Frameworks that provide coherence on both the content and process of development are invaluable” (Hammond et al., 2017, p. 495). Against this background, the research problem that is addressed by this study, is summarised in the following section.

1.4. Problem statement

The complexity and fast-changing nature of the business and organisational environment, requires adaptive leadership which would be underpinned by a leader identity which is adaptive. This is particularly relevant to middle-managers who hold multiple identities simultaneously and who are often stretched between competing interests of their managers, followers, and other stakeholders of organisations. This complex positioning of middle managers require engagement in identity transitions and identity work specifically as it relates to the tension between their professional identity, self-identity, managerial identity, self-identity and leader identity. However, the dynamic interplay of these identities is not well researched despite the increasing demands of a challenging business and organisational environment in which would challenge multiple identities and the relationship between this identity work would have an impact on the resultant leader identity. Identity work ensues when an identity is triggered, when an experience or event brings an identity to the foreground. In these fast-changing times multiple identity triggers would be experienced by leaders, and these would have variable impacts on the multiple identities in different ways.

This study is aimed at arriving at a better understanding of the leader identity development of middle managers and, more specifically, how potential leader identity triggers are appraised and the impact of this on managerial leader identity over time. Although much has advanced in our management scholarship it does a disservice to understanding the identity development of a single identity in isolation from the other related inter identities. It is in the interplay

between the multiple identities that we see strain or tensions that evolve into a different trajectory of identity development and ultimately behaviours of that manager. This is the lens this study looks through – the identity development of managers' leader identity given the interplay between identities and influence of multiple triggers over time.

1.5. Research questions and aim of the study

The research question that guided this study is two-fold:

- How do managers appraise potential leader identity triggers?
- What is the impact of this on their leader identity development over time?

The aim of the study was to build a rich picture of the interplay of multiple identities, the multiple influences, and the multiple responses in leader identity development of middle managers over time by exploring how managers appraise potential leader identity triggers and what the impact of this is on their present and future leader identity over time. Based on the findings, I set out to develop a framework indicating the intra-identity dynamics associated with leader identity development.

1.6. Research approach

The phenomena under study are dynamic and complex and my aim was not to conduct a study to confirm an existing hypothesis, but rather to engage in an in-depth exploration of the phenomena under study following an interpretive approach. I adopted a qualitative research methodology to meet the research objectives by employing a Longitudinal Interpretative Phenomenological Analysis (LIPA) (Farr & Nizza, 2019). IPA is an interpretivist research paradigm initially developed by Smith (1996) which is inductive, interpretive, and idiographic in nature. This allowed for a rich picture of the phenomena to emerge. Furthermore, LIPA acknowledges the temporal nature of the phenomena allowing for the structuring of the data gathering and data analysis over a period of time. In this study data was gathered in three touch points with a sample of four (4) middle managers over a period of eight (8) months to gauge their appraisal of and responses to potential leader identity triggers over time. The analysis identified patterns of similarity and difference over the touch points, and the period for each case as well as across cases (Farr & Nizza, 2019; Gill, 2014, 2015; Pietkiewicz & Smith, 2012; Smith, 1999, 2007; Smith & Osborn, 2009).

1.7. Trustworthiness of the study

The trustworthiness of this study was ensured by following the guiding criteria of well-known scholars in the field of qualitative research (Denzin and Lincoln (2005); Guba, (1981), Lincoln and Guba (1985; 2005), Nizza, Farr & Smith (2021), Smith (2022), Yardley (2002) namely sensitivity to context, commitment and rigour, transparency and coherence, and impact and importance (Yardley 2017) and the corresponding criteria of credibility, dependability, conformability, transferability (Lincoln & Guba, 2005). These criteria have been widely accepted to demonstrate trustworthiness of qualitative research which differ from the criteria applied to quantitative research, namely reliability and validity. The qualitative criteria applied are discussed in more detail in Chapter 3 and in Chapter 5 this study is evaluated through the application of these criteria.

1.8. Overview of the study

Chapter 2 below is dedicated to an overview of the existing body of knowledge as it relates the topic of study as well as an in-depth discussion of the research gaps that exist and which of these gaps are addressed through this study. In Chapter 3 the methodological research choice of conducting a study within an interpretivist paradigm following a qualitative method is argued. The research design is provided, and the method is explained with reference to sampling, data collection, data management, and data analysis. The findings of this study are presented in Chapter 4 and are integrated with the discussion thereof. This chapter concludes with the presentation of the framework that was developed based on the findings. In Chapter 5 the study is briefly summarised by providing an overview whereafter the study's trustworthiness is evaluated by applying qualitative criteria as well as arguing the contributions of the study on theoretical, methodological, and practical level. The limitations of the study are thereafter reviewed and are followed with recommendations for future research.

Chapter 2. Literature review

2.1. Introduction

The need to adopt a “clearly defined, well-focused” literature review strategy (Schurink et al., 2021) and conducting the literature review in an organised, systematic manner, was of particular importance in this study. The growth and wide array of studies has led to an increasingly vast, heterogenous and fragmented body of literature that has invited a range of reviews that distinguish between the levels of identity, types of identity, and theoretical approaches (Alvesson, 2020; Alvesson et al., 2008; Atewologun et al., 2017; Brown, 2015; Caza, Moss, et al., 2018; Corlett et al., 2017; Epitropaki et al., 2017; Ibarra et al., 2014; Miscenko & Day, 2015). Some authors are critical of the growth in literature finding it fragmented and a formidable task to try to make sense of the range of approaches and findings (Brown, 2015; Corlett et al., 2017; Sveningsson & Alvesson, 2003b). It is stated that leadership and followership identity extant literature suffer from a multitude of epistemological paradigms and perspectives (Epitropaki et al., 2017).

The literature review is an essential aspect of research to ensure that research is theoretically and conceptually contextualised within the existing body of knowledge (Collis & Hussey, 2013; Schurink et al., 2021). Schurink et al. (2021, p. 94) regard a literature review as a “mechanism for ensuring that a study is rooted in an existing body of knowledge and the discipline within which the study is conducted”. It enables the researcher to determine the focus of a study against the background of existing studies and to ensure that the research contributes meaningfully to current discourses (Schurink et al., 2021). As such, the literature review ensures that the study enters into a meaningful dialogue with other studies in the field and a thorough contextualisation plays an important role justifying the need to conduct a particular research study.

The literature review serves various purposes throughout the research process. Kumar (2019) stresses the importance of the literature review within the broader research context, namely, to clarify the research problem, strengthen the methodology and expand the researcher’s knowledge base. The literature review allows the researcher to be well informed about the subject of interest which is critical to the formulation of theoretically and conceptually sound research questions (Schurink et al., 2021). Through the literature review process the researcher is exposed to a variety of research methodologies ensuring sound methodological choices that not only best serve the study at hand but also allows for developing perspectives

that adds to what is already known about the phenomenon under study (Collis & Hussey, 2009; Schurink et al., 2021).

As such, a thorough literature review assists the researcher in identifying knowledge gaps within the existing body of knowledge (Collis & Hussey, 2009; Kumar, 2019; Maree & Van der Westhuizen, 2007; Schurink et al., 2021). Lastly, the literature review provides a comparative framework within which the researcher can make sense of findings within a broader context of existing knowledge (Collis & Hussey, 2009; Kumar, 2019; Schurink et al., 2021).

This chapter is the product of the literature review process which started before the planning of the research proposal and continued until the document was finalised for submission. In this chapter an overview of the literature review process is provided (Section 2.2) to indicate how the literature review informed the research process and how the research process guided the continued literature search and review. The process that was followed was structured according to a set of criteria (relevance, recency, credibility, completeness) to ensure that the literature search was conducted, as advised by Schurink et al. (2021), according to “a clearly defined, well-focused” strategy and in an organised, systematic manner.

2.2. Overview of the chapter

Throughout the literature review process the literature review map was reviewed and refined and was finalised as depicted in Figure 3 below which formed the basis of structuring this chapter. In this section an overview of Chapter 2 is provided.

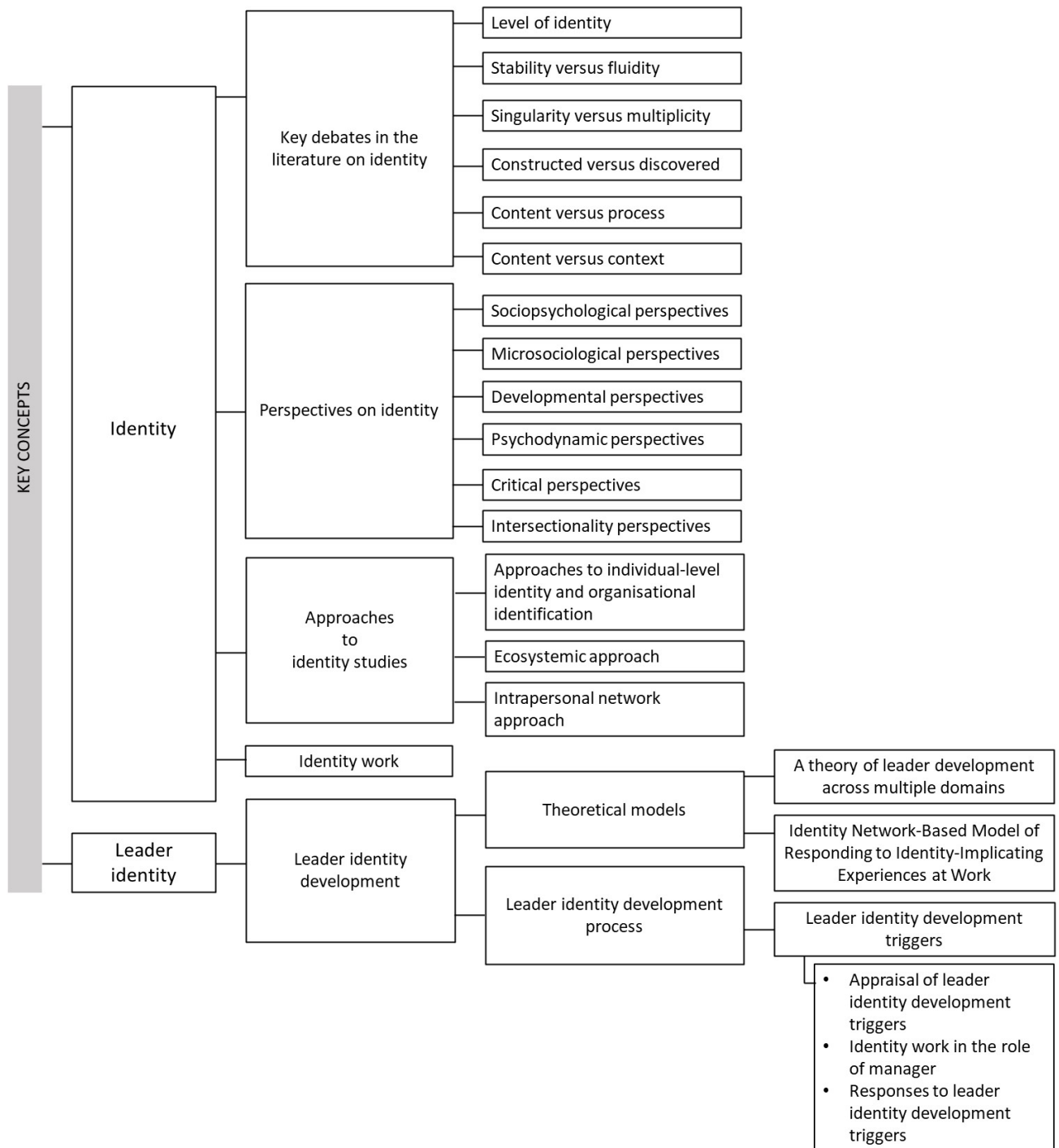


Figure 3
Map of the Literature Review

Although this study is conducted with a focus on leader identity in an organisational context the researcher did not limit the literature review to leader identity studies and organisational studies. The theoretical body of knowledge on identity spans various fields of study and limiting the review to only organisational or leadership studies would have negatively affected the quality and thoroughness of the review. Furthermore, understanding identity in organisational

context is directly related to the underpinning theoretical traditions and theorisations on identity and therefore the inclusion of broader theoretical literature was imperative to ensure contextualisation.

In Section 2.3. the key concept of identity is discussed with reference to a wide variety of definitions found in the literature. This discussion is followed by an overview of key debates in the literature on identity. The inclusion of this is important to contextualise this study and the findings in relation to scholarly debates. These debates centre around the different levels of identity, identity stability versus identity fluidity, singularity of identity as opposed to multiple identities, the extent to which identity is constructed or discovered as well as differing focus areas of research on identity, namely content, context, and process.

The theoretical body of knowledge on identity is expansive and research on identity is conducted within a wide range of disciplines. Atelowogun et al. (2018, p. 3) refer to the multitude of constructs in identity studies with various definitions and applications and argue that “lack of construct clarity hinders theory development and precludes dialogue across different meta-theoretical perspectives and research streams”. The researcher deemed it necessary to provide a sound theoretical base for this study and to contextualise the concepts and constructs against a solid theoretical background. Therefore, an overview of the different perspectives on identity is provided, namely: socio-psychological perspectives, micro-sociological perspectives, developmental perspectives, psychodynamic perspectives, critical perspectives, and intersectionality perspectives.

Following on the discussion of these different perspectives, three approaches to identity studies are discussed, namely: approaches to individual-level identity and organisational identification, an ecosystemic approach and an intrapersonal network approach. The approach to individual-level identity and organisational identification was included due to the relevance of the organisational setting even though the approach only considers individual-level identity. The eco-systemic approach was included because it provides a framework for considering a wide variety of factors impacting on identity and is of such a nature that it allows for a conceptually sound application in organisational context. The intrapersonal network approach (Ramarajan, 2014) was selected for its central consideration of multiple identities within the identity network of an individual. This approach bears significant relevance to managers as they, in particular, are confronted with a high level of ambiguity and a wide variety of implicit and explicit roles – which all impacts on the complexity of the identity network.

As identity work is a core concept related to this study and referred to in subsequent sections of the literature review, the concept is clarified and discussed in the context of the existing literature.

In addition to the foundational concept of identity, leader identity takes central stage in this study. The discussion on the concept of leader identity and leader identity development follow on the discussion of identity as identity scholarship has informed the development of leader identity as concept as well as the theorisation on leader identity.

In addition, two theoretical models were included. A theory of leader development across multiple domains (Hammond et al. 2017) was selected due to the relevance in terms of leader identity as well as the fact that multiple domains and the interaction between domains are considered. Bataille and Vough's (2022) identity network-based model of responding to identity-implicating experiences at work was included due to it providing a thorough theoretical basis the inter identity network at work. Furthermore, this model bears direct relevance to the phenomenon under study in terms of identity triggers, the appraisal thereof and the response thereto.

The leader identity development process is discussed in more detail and with consideration of the work of other scholars in addition to the contributions of Hammond et al. (2017) and Bataille and Vough. (2022) Due to the centrality of leader identity development triggers in this study, significant exploration is carried out on existing knowledge in terms of leader identity triggers and how these triggers are appraised and responded to. This discussion is also framed in the context of the identity work of managers.

Against the background of the literature review, the researcher locates herself and the study within the broader context of identity and leader identity studies. This is an important aspect of the literature review process as it assists the researcher to be aware of possible theoretical and methodological biases that might influence the interpretation of findings. Furthermore, it locates this study within the existing body of knowledge allowing the study to be situated in the continuing dialogue on identity and leader identity studies. Lastly, based on the review of the literature, the gaps in the existing body of knowledge are highlighted followed by a discussion of how this study addresses these gaps before providing a summary of this chapter.

2.3. Identity

The word 'identity' stems from the Middle French *identité*, the Late Latin *identitat-*, and from the Latin *identidem*. *Identidem* is a contraction of *idem et idem* and literally means, "same and same". This 'sameness' is captured in Erikson's (1963) understanding of what a sense of identity denotes, namely, that an individual's self-image or self-concept corresponds with how he or she is viewed by others. Ironically, the definition of 'identity' in the literature escapes any sense of sameness and lacks theoretical clarity and rigour (Atelowogun et al., 2018; Bilgrami, 2006; Foreman, 2000; Petriglieri, 2011).

Identity is a complex concept. In the simplest terms it can be defined as the way in which an individual views himself or herself or themselves which Ashforth and Schinoff (2016) refer to as self-definition. Erikson (1963) defines identity as the self-image of an individual and Brown and Coupland (2015, p. 13) refer to identity as the "meanings individuals attach reflexively to themselves". Ramarajan (2014, p. 594) defines identity as "the subjective knowledge, meanings, and experiences that are self-defining". In essence, it is the answer to the question "Who am I?" (Cerulo, 1997; Bataille & Vough, 2022).

The multiple meanings assigned to the concept identity is due to the broad spectrum of disciplinary and theoretical approaches to the concept of identity (Petriglieri, 2011; Ramarajan, 2014). One can, however, argue the reverse: the multiple meanings assigned to the concept of identity give rise to the multitude of theoretical approaches to identity studies. As Erikson (1968, p. 9) stated: "The more one writes about this subject, the more the word becomes a term for something that is as unfathomable as it is all-pervasive". According to Cornelissen et al. (2007, p 83): "The increase in theoretical and research attention to identity and identification within and across organizational contexts can, in part, be attributed to the richness and profundity of the core 'identity' concept".

Studies on identity have grown exponentially over the last thirty years (Albert, Ashforth & Dutton 2000; Atewologun et al., 2017; Bataille & Vough, 2022; Bilgrami, 2006; Brown, 2017; Corlett, McInnes, Coupland & Sheep, 2017; Cornelissen, Haslam & Balmer, 2007; Day & Harrison, 2007; Hammond, Clapp-Smith & Palanski, 2017) and have been characterised by a myriad of theoretical approaches within various research traditions and across numerous disciplines (Alvesson, 2020; Alvesson et al., 2008; Atewologun et al., 2017; Brown, 2015; Caza et al., 2018; Corlett, McInnes, Coupland, & Sheep, 2017; Cornelissen et al., 2007;

Epitropaki et al., 2017; Ibarra et al., 2014; Miscenko & Day, 2015). This has resulted in a body of knowledge on the complex topic of identity that is vast, heterogenous, and fragmented.

Reviews of the literature on identity indicate distinguishing factors such as levels of identity, types of identity, and theoretical approaches (Alvesson, 2020; Alvesson et al., 2008; Atewologun et al., 2017; Brown, 2015; Caza et al., 2018; Corlett, McInnes, Coupland, & Sheep, 2017; Cornelissen et al., 2007; Epitropaki et al., 2017; Ibarra et al., 2014; Miscenko & Day, 2015). Various reasons have been cited for this. Petriglieri (2011) states that the multiple definitions of identity are due to the diversity of theoretical approaches. Concurrently, it is also the varied application of the identity concept that leads to a multitude of theoretical perspectives (Albert et al., 2000; Cornelissen et al., 2007).

Vignoles, Schwartz, and Luyckx (2011, p. 7) state that the reason for the “confusion regarding the meaning of “identity”, is the different theoretical, metatheoretical, and disciplinary traditions, as well as varying methodologies and different levels of analysis applied by scholars. Cornelissen et al. (2007) also refer to the application of the identity concept across multiple disciplines.

Notably key debates in the identity literature stem from the differences in the underlying theoretical approaches and assumptions. One the one end of the spectrum individuals experience identity as fluid, dynamic, whereas on the other end identity is experienced as fixed, essentialist. Further identity is viewed as being informed by the power of organisational regulation, as opposed to the power of individual agency, the power of individuals to craft their own identities. Broadly speaking, these divergences in identity theories are influenced by three theoretical traditions: functionalism, interpretivism, and a critical approach.

Within the functionalist tradition, states of being are determined by the function of the brain state (Harrison-Barbet, 1990). Functionalist traditions tend to describe identity as more fixed, stable, and coherent in contrast with the interpretive traditions which tend to describe identity as more fluid and dynamic. The degree of this fluidity becomes more pronounced in the critical traditions as identity is seen as fragile, fragmented, and temporary. The degree of agency also differs as functionalists attribute higher levels of individual agency to individual development, as opposed to the critical approaches in which the influences of institutions and societies are primary. The interpretivist traditions tend to incorporate both influences of the individual and the context in identity development.

Much of the identity literature pivots on key predicates that serve as the foundations for what are often seemingly intractable debates (Brown, 2019, p. 9). There are intense and continuing intertwined debates about how identities should be theorised and researched. According to Vignoles et al. (2011, p. 8), these debates centre around four questions which contribute to the fragmentation of the literature:

- (i) Is identity viewed primarily as a personal, relational, or collective phenomenon?
- (ii) Is identity viewed as relatively stable, or as fluid and constantly changing?
- (iii) Is identity viewed as discovered, personally constructed, or socially constructed?
- (iv) Should identity be researched using quantitative or qualitative methods?

In 2015, Brown outlined some of the most significant disputes centred on the extent to which identities are:

- (i) chosen by or ascribed to individuals;
- (ii) generally stable, evolutionally adaptive or fluid;
- (iii) unified and coherent or fragmented and possibly contradictory;
- (iv) motivated (or not) by a need for positive meaning; and
- (v) framed (or not) by a desire for authenticity.

In the following section, the key debates that emerged from the literature are highlighted.

2.4. Key debates in the identity literature

2.4.1. Level of identity

As stated, identity theories can be categorised based on whether the focus lies on the individual, the relational (interpersonal) or the collective (Miscenko & Day, 2015; Vignoles et al., 2011). Individual level theories focus on the content and processes pertaining to individual identity. Research conducted on individual-level identities are fragmented in terms of construct definition and implementation (Brown, 2015; Alvesson, Ashcraft & Thomas, 2008; Atewologun et al., 2017). Relational level theories focus on the social content and processes associated with the formation of identity. Collective level theories are concerned with both the individual as well as social context and processes in identity formation.

In organisational context, Atewologun et al. (2017) differentiate identity research as:

- (i) individual (relating to people's personal sense of self within the organisation);
- (ii) group (relating to the shared identity of teams and sections within an organisation);

- (iii) organisational (relating to the identity of the organization as a whole);
- (iv) and cultural (relating to commonalities in identity across organisations and within a society).

Corlett et al. (2017) offers a framework which overlays a range of theoretical traditions with four levels of identity as individual, group, organisational and societal.

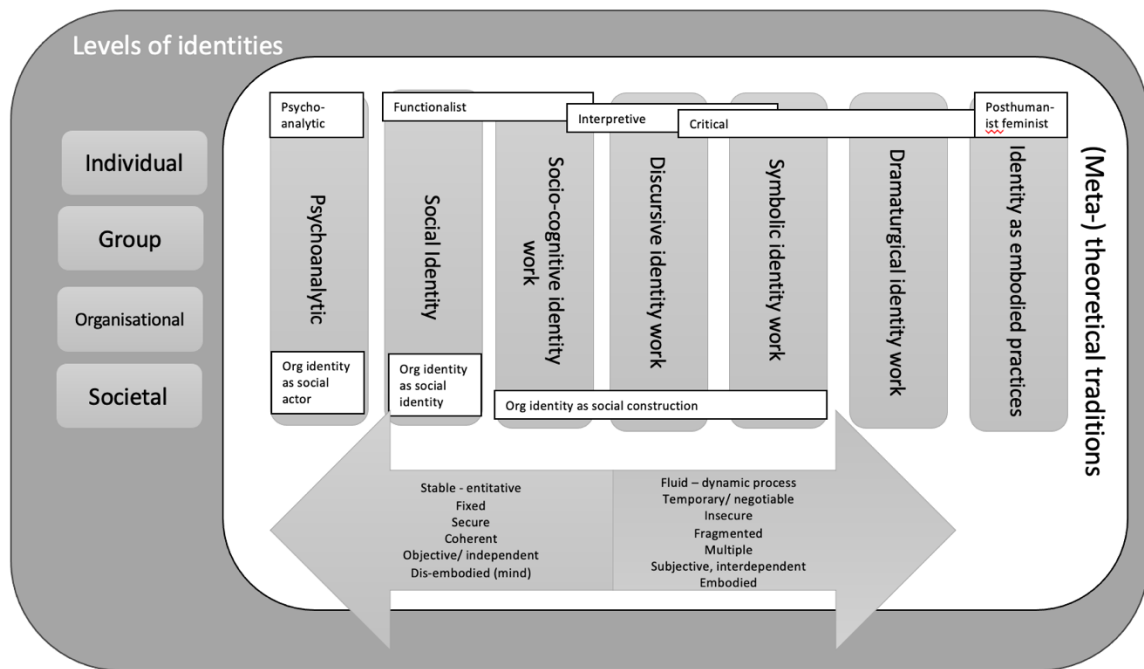


Figure 4

Author Adapted and Abridged Registers of Identity (Corlett et al, 2017)

2.4.2. Stability versus fluidity

Theorists also hold different perspectives in terms of the extent to which identity is mostly stable or open to change (Miscenko & Day, 2015; Vignoles et al., 2011). In terms of theories that hold that identity is fluid, there is also a differentiation in whether the focus is on short-term situational change or long-term change. Discursive theories hold that identity is constantly in flux and used to achieve interactional objectives (Vignoles et al., 2011).

2.4.3. Singularity versus multiplicity

Singularity implies a view on identity as an integrated whole whilst multiplicity acknowledges the existence of multiple sub-identities which can be conflictual. Although the concept of multiple identities is not new in any discipline, there is still a lack of studies that focus on multiple identities and the interaction of these with each other and the environment – particularly in organisational studies (Ramarajan, 2014). Ramarajan (2014) emphasises the need for an approach that allows scholars to consider more than two identities simultaneously and to examine relationships among identities in greater detail.

Reference to the existence of multiple sub-identities is found in the literature. I have included a list as follows:

- (1) past selves—who the person was in the past (Albert, 1977);
- (2) possible selves—who the person may become in the future (Markus & Nurius, 1986);
- (3) ideal selves—who the person would ideally like to be (Higgins, 1987) and
- (4) ought selves—who the person thinks he or she should be (Higgins, 1987; Obodaru, 2012);
- (5) aspirational identity - story-type of one who is earnestly desirous of being a particular kind of person and self- consciously and consistently in pursuit of this objective (Thornborrow & Brown, 2009);
- (6) alternative selves – who the person could have been if something in the past happened differently (Obodaru, 2012);
- (7) unwanted selves – which is the projected unwanted aspects of self onto others (Petriglieri & Stein, 2012);
- (8) portable selves – selves endowed with definitions, motives, and abilities that can be deployed across roles and organizations over time (Petriglieri et al., 2018);
- (9) preferred identities as “identity narratives favoured by those who formulate them and offered to others as notionally acceptable selves, they are flexible, ad hoc constructions tactically devised to stave off harm in response to threat” (Brown et al., 2019, p. 3).

These different versions of self-identity are distinct and discrete, and it is not known which is activated when and how the dynamic exchanges between these and the sub-identities impact overall identity development. This literature review highlights the dynamism of identity development and the importance of exploring the interplay between sub-identities and self-identity. The overarching identity may be quite different emerging from distinct and different identity narratives of the sub-identities. Most notably this points to the need to explore these dynamics over time as identity is constantly evolving and these states do not remain static.

2.4.4. *Constructed versus discovered identity*

The debate around constructed identity as opposed to discovered identity relates to the extent to which individuals' agency in the construction of identity is acknowledged or whether identity is seen as an inherent and structural component of the individual waiting to be uncovered. Brown (2017) argues against this dichotomous approach while Atewologun et al. (2017, p. 40) state that "identities are neither simply chosen by autonomous individuals unconstrained by context, nor merely allocated or imposed by context".

2.4.5. *Content versus process focus*

A content focus on identity implies a preoccupation with the nature of identity whilst a process focus is concerned with the way in which identity is constructed. Various scholars (Ainsworth & Grant, 2012; Lanka, Topakas & Patterson, 2019; McInnes & Corlett, 2012) argue the importance of not only focusing on the nature of identity but also the way in which it is constructed. In similar vein, scholars (Ashforth & Schinoff, 2016; Hammond, Clapp-Smith, & Palanski, 2017; Lanka et al., 2019; Marchiondo, Myers, & Kopelman, 2015) argue that leader identity is constructed through relational and interactional processes over a period and in different contexts.

2.4.6. *Content versus context focus*

Content-focused research refers to research that centres around the nature of identity whereas context-focused research refers to an exploration of how environmental contexts contribute to the construction of identity.

According to Atewologun et al. (2017) there has not been significant consideration of identity context and they concur with Brown (2017) that more research should be conducted on how organisational, national, and cultural contexts influence identity foci. Similarly, as stated previously, scholars (Ashforth & Schinoff, 2016; Hammond et al., 2017; Lanka et al., 2019; Marchiondo et al., 2015) also argue that leader identity is constructed through relational and interactional processes over time and in different contexts.

These arguments may be circular and intractable as the categories become self-fulfilling and do not necessarily advance an understanding in identity research. For example, a scholar declares their theoretical approach and the findings concur with this view of identity, and the

discrepancies or nuances between the various approaches are not necessarily explored. It seems less useful to argue for an either /or argument but rather to research and examine under which circumstances certain characteristic of identity work and identity development can emerge.

So, whereas knowing the underlying philosophy does support an understanding of the literature by understanding the theoretical underpinning of the author or study, this is sometimes used to excuse or dismiss what may be important dynamics. The identity may be experienced as fluid due to the interplay between identities and not simply because the approach is informed by an interpretivist approach, and similarly the dynamics between influences and appraisals may be so strong as to inform identity work which does not mean the approach is functionalist. Important distinctions and dynamics may be missed by negating the alternate perspectives proffered in each theoretical tradition.

As argued, these key debates in the identity literature stem from the differences in the underlying theoretical perspectives of three broad traditions: functionalism, interpretivism, and a critical approach, which, since they are such distinct approaches to some extent, account for the fragmented nature of identity studies. Additionally, stemming from these traditions and emanating from the gaps between these traditions, there are numerous approaches to and perspectives on identity and the study thereof. To provide a solid theoretical contextualisation of this study, it is necessary to not only consider the broad underpinning traditions but also the perspectives and approaches that underpin the study of identity. These perspectives and approaches are discussed in the following section.

2.5. Perspectives on and approaches to identity and identity studies

2.5.1. Socio-psychological perspectives

Within the discipline of social psychology, the underlying assumption is that the individual should be understood in his or her social context (Meyer, Moore & Viljoen, 2003). Social identity theory is rooted in social psychology. Social identity theory is based on the work of Tajfel (1972) who argued that the self-concept is partly a reflection of social group membership and that the individual is affected by any positive or negative experiences of the group (Prost, Piermattéo & Lo Monaco, 2023).

In organisational context, researchers apply social identity theory to examine multiple work identities (Ramarajan, 2014). According to Ramarajan (2014, p. 602) many of these studies focus on the independent operation of these identities but notes that some studies investigate how multiple identities “can be simultaneously salient rather than only salient one at a time”.

2.5.2. Microsociological perspectives

According to Ramarajan (2014) negotiation is a central focus of microsociological perspectives. This includes negotiating individual identity with others as well as negotiating amongst individual identities (Ramarajan, 2014). From a microsociological perspective identities are viewed as connected hierarchically with different roles and relationships and this perspective is primarily focused on meaning-making (Ramarajan, 2014). This perspective draws from identity theory and identity construction approaches (Ramarajan, 2014). For example, Stryker and Burke (2000, p. 284) refer to structural symbolic interactionism, and view identity as “composed of the meanings that persons attach to the multiple roles they typically play in highly differentiated contemporary societies”. Additionally, Stryker and Burke (2000) emphasise the interplay between social structures and identities in the construction of identity and the process of self-verification.

In organisational context, identity construction is an important focus area (Ramarajan, 2014). For example, Vough (2012) focuses on both identity content and processes through examining the sense-making processes of individuals within the context of work group, organisation, and profession. Vough (2012) argues that individuals have different attachments to different organisational contexts and influence the way in which people relate to and situate themselves within these organisational contexts.

2.5.3. Developmental perspectives

From a developmental perspective, identity is seen as self-evolving through an ongoing developmental process over time (Ramarajan, 2014). Initially the self is entwined with the context but through a process of differentiation the individual develops an identity separate from his or her context. From a developmental perspective multiplicity of self as well as unity of self is seen as the ideal state.

Scholars such as Higgins and Kram (2001) and Higgins and Thomas (2001) studied interpersonal mentoring relationships in the work context and indicated how organisations and

work relationships can serve as developmental contexts. According to Ramarajan (2014, p. 606) these and other studies (Petriglieri, Wood & Petriglieri, 2011; Petriglieri et al., 2018) focus on the “acquisition of a single new identity such as leader identity”. For example, Petriglieri et al. (2011, 2018) explored how leadership development and MBA programs contribute to students’ ongoing development and practice of leadership.

2.5.4. Psychodynamic perspectives

Like development perspectives, an underlying assumption of psychodynamic perspectives is that identity is fluid and develops over time. However, psychodynamic perspectives are focused on how identities develop based on formative experiences (Ramarajan, 2014).

A further core assumption of these perspectives is that aspects of identity can be in conflict and tends to divide the self into a “good” part and a “bad” part (Ramarajan, 2014). Due to the discomfort created by the perceived “bad” parts, these parts are often suppressed and projected onto others. Ramarajan (2014, p. 608) highlights an important question that the psychodynamic perspective introduces to the consideration of identity, namely, “to what extent are our multiple identities implicit, i.e., below our conscious awareness?”

From a psychodynamic perspective, identity is understood to hold both conscious and unconscious aspects as stated by Terblanche and Cilliers (2021, p. 1): “identity is defined as the personal essence or core of a consciously recognisable selfhood *and* a private, unknown and unconscious internal arena, combining objective/subjective and known/unknown experiences”. As individuals are not necessarily conscious of all their identities, they might be unaware of having multiple identities which could be problematic as such individuals might struggle to alter or revise their identities (Ramarajan, 2014).

Research conducted from a psychodynamic perspective indicates that relational selves can impact behaviour significantly without the individual being aware of this (Andersen & Chen, 2002; Ramarajan, 2014). In a study conducted by Terblanche and Cilliers (2021) nursing students unconsciously had trouble in effectively taking up their professional role:

They defended against their discomfort by splitting their experiences into what they introjected and projected. They introjected incompetence in coping with the emotional demands of the role and projected their anger onto authority figures. Their professional role identity got stuck in a de-authorised position where they could survive but not

develop their selves in their new role. These experiences inhibited their authenticity and learning ability. (p. 1)

Like the developmental perspective, multiplicity as well as unity of self is the ideal state from a psychodynamic perspective and “conscious awareness and integration of multiplicity is seen as a sign of growth” (Ramarajan, 2014, p. 608).

2.5.5. Critical perspectives

The critical perspective holds that self-identity takes shape through power relations (Ramarajan, 2014). Through a critical lens, identity is seen as fragmented and the existence of a unified self is denied (Ramarajan, 2014). Critical perspectives are largely focused on subjective meanings and experience and identity is seen as multiple and fragmented (Ramarajan, 2014). According to Alvesson et al. (2008, p. 6) identity lies in the interrelatedness of “subjective meanings and experience, to our ongoing efforts to address the twin questions, ‘Who am I?’ and — by implication — ‘how should I act?’”. Furthermore, from a critical perspective, identity is seen as fluid but deeply rooted in and constrained by power relations (Ramarajan, 2014).

Organisational research from a critical perspective investigates power relations and positionality and organisational settings are viewed as structures that exert power over employees to restrict their identities to a singular work identity (Carsten, Oxtoby & Perin, 2021; Ramarajan, 2014).

2.5.6. Intersectionality perspectives

Intersectionality is defined as “the mutually constitutive relations among multiple social identities” (Ramarajan, 2014, p. 610). Corlett and Mavin (2014) state that intersectionality as a theory explores how social identities are mutually constitutive and how different dimensions of social life are inseparable at individual, interpersonal and structural levels.

Atewolugun (2014) argues that intersectionality studies in organisational context are needed to give voice to African American women who have been silenced due to both their minority ethnicity and gender status. Atewolugun (2014, p. 277) conducted a study exploring experiences “that raise individuals’ salience of their intersecting gender, ethnic and senior organizational identities”.

Avraamidou's (2020) conceptual work on the development of science identity explored recognition and emotions as central constructs of identity through an intersectionality lens. She argues that an intersectional lens sheds light on these core constructs as well as on "issues related to power, inequality, racism and exclusion" (Avraamidou, 2020, p. 323).

2.5.7. Approaches to individual-level identity and organisational identification

Brown (2017, p. 3) focuses on individual-level identity as well as organisational identification (defined as "ways people draw on their membership of organizations in their constructions of self"). Based on a review of identity work and identification studies, Brown (2017) highlights five approaches to identity and identification processes.

- (i) Discursive: Identities and identification processes are constituted through situated practices of language use;
- (ii) Dramaturgical: Identities and identification processes are constituted through actions (performances of the self);
- (iii) Symbolic: Identities and identification processes are constituted through the adoption, display and manipulation of object symbols;
- (iv) Socio-Cognitive: Identities and identification processes are constituted through cognitive mechanisms and/or through sensemaking; and
- (v) Psychodynamic: Identities and identification processes are constituted through the operation of unconscious ego defences.

There are challenges against the primacy being given to individual identity. Alvesson (2020) argues that the growth is related to contextual and societal trends which may misdirect our obsession with individual interests. In a post-feminist critique Knights and Clarke (2017) raise questions about the "amnesia and myopia" they see in the literature on identity at work in management and organisation studies. These authors argue that the "reinforcing everyday preoccupations with the self that can turn into narcissism and deflect and curtail alternative practices of embodied engagement" (Knights & Clarke, 2017, p. 337).

This does not negate the fact, however, that the "study of self-identities in organizations is no longer a relatively minor concern associated only with a specialist community, but an increasingly mainstream preoccupation... of scholars with diverse interests" (Brown, 2019, p. 8). In particular, the stream of research around identity practices within work and organisation-

based identities is growing. A key theme Brown (2019) found in Organization Studies papers has been how identities and identity work are foregrounded in literature on leadership (Croft, Currie, & Lockett, 2015; Driver, 2013; Gagnon & Collinson, 2014; Petriglieri & Stein, 2012).

2.5.8. Ecosystemic approach

In broad terms, the ecosystemic approach is based on an epistemological presupposition that systems consist of sub-systems and that there exist complex and dynamic interrelations between different parts of a system. The theoretical model, “The Multicultural Guidelines Task Force model” (Clauss-Ehlers, Chiriboga, Hunter, Roysircar & Tummala-Narra, 2019), is an example of a model based on an ecosystemic approach. This model is applied within the field of psychology and underlies the multicultural guidelines according to which psychologists can reflect on a wide variety of dimensions that contribute to identity (Clauss-Ehlers et al., 2019).

This is a layered, ecological model that include individual-level, relational level and collective level aspects of identity as well as contextual antecedents of identity which influence identity formation “across contexts and time” such as “age, generation, gender, gender identity, ethnicity, race, religion, spirituality, language, sexual orientation, social class, education, employment, ability status, national origin, immigration status, and historical as well as ongoing experiences of marginalisation” (Clauss-Ehlers et al., 2019, p. 232).

This model is based upon the ecological model of Bronfenbrenner (1977, 1979) which consists of five nested spheres:

- (i) the microsystem of immediate family, friends, teachers, and institutions that have direct influence on the individual;
- (ii) the mesosystem that refers to interrelations of various social entities found in the microsystem that affect a person’s life (e.g., home, school, community);
- (iii) the exosystem that deals with societal and cultural forces, including public policies, laws, and governmental influences, that act upon the individual without necessarily having a direct link to individual experience;
- (iv) the macrosystem that corresponds with the cultural context in which the individual lives, such as cultural values and norms; and
- (v) the chronosystem that deals with the passage of time, historical trends and transitions, and the historical context surrounding individual experience.

The ecological model (Figure 5) consists of five nested systems represented by different levels that are in dynamic interplay with each other and exert influence over each other (Clauss-Ehlers et al., 2019). An important aspect underlying the model is that these systems transact over time (Clauss-Ehlers et al., 2019).

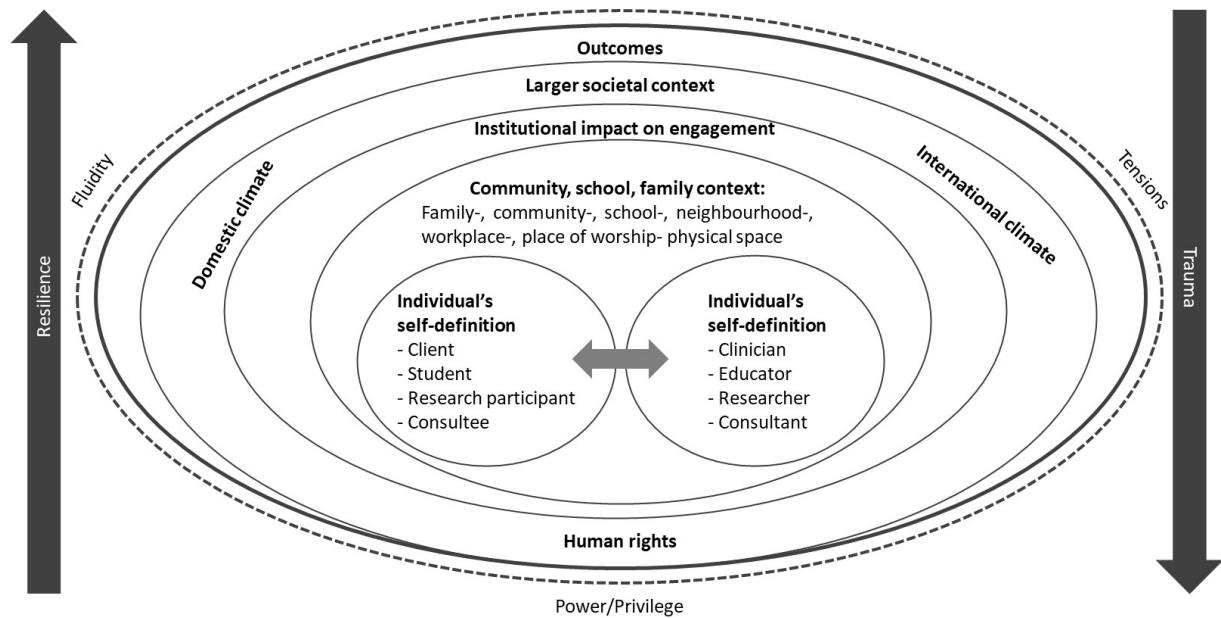


Figure 5
An ecological model of identities

The two inner-most circles constitute the first level and represent the “bi-directional model of self-definition and relationships” (Clauss-Ehlers et al., 2019, p. 233). The second concentric circle represents the community, school and family context and exerts influence over the bi-directional relationships of level one (Clauss-Ehlers et al., 2019). Level three relates to the way in which the contexts of level 2 are experienced by the individuals on level 1 and how this experience impacts on the individuals’ self-definition and relationships with one another (Clauss-Ehlers et al., 2019). Level four is concerned with the influence of the larger social context within which the individuals find themselves and refer to both the domestic and international climate (Clauss-Ehlers et al., 2019). This fourth layer encompasses all previous levels and includes consideration of human rights (Clauss-Ehlers et al., 2019). Level five represents outcomes and encompasses all prior levels (Clauss-Ehlers et al., 2019). Outcomes should be understood as the resultant effects of the bi-directional relationships on level one as well as all interactions and experiences occurring on levels 2, 3, and 4 (Clauss-Ehlers et al., 2019). The results or outcomes can be positive as well as negative (Clauss-Ehlers et al., 2019).

2.5.9. Intrapersonal network approach

The intrapersonal network approach was developed by Ramarajan, (2014) and assumes that people have multiple identities and that these identities influence their organisational behaviour. Based on a review of literature on multiple identities, Ramarajan (2014, p. 590) proposes an intrapersonal network identity approach to research to “enable [...] scholars to consider more than two identities simultaneously” and to assist scholars to “examine relationships among identities in greater detail”.

Ramarajan (2014) argues that individual identity can be viewed as a set consisting of a network of identities. Each of these identities is represented by the name of a node that denotes a certain characteristic or category and a meaning that refers to the interpretation the individual assigns to it. Ramarajan (2014) further posited that the nodes are activated and co-activated in response to environmental input. The interrelationship amongst the different nodes is two-dimensional. Firstly, the different identities are linked through ties that denote the relationships between identities. Ties can either be regarded as conflicting, enhancing, or integrated. Secondly, the interrelationship between identities is characterised by hierarchy.

Through a review of the literature, Ramarajan (2014) found that ties are mostly described in the literature in terms of these three types but argues that the nature of relational ties should be broadened to consider additional types of relationships. Ramarajan (2014, p. 622) proposes two additional types of ties — power relations and temporal ties. By adding these two categories of ties, Ramarajan (2014) incorporates assumptions underlying the developmental, psychodynamic, critical, and intersectional perspectives. Furthermore, Ramarajan (2014, p. 622) acknowledges that “multiple types of ties (multiplex ties) between the same identities”.

As stated, Ramarajan (2014) describes the relationship between identities in terms of hierarchy which means that there is a difference in the degree to which identities are deemed important and the frequency to which identities are activated or become salient. Ramarajan (2014, p. 622) states that salience represents the probability of an identity being activated in a variety of situations, with higher-salience identities having higher probabilities of activation”.

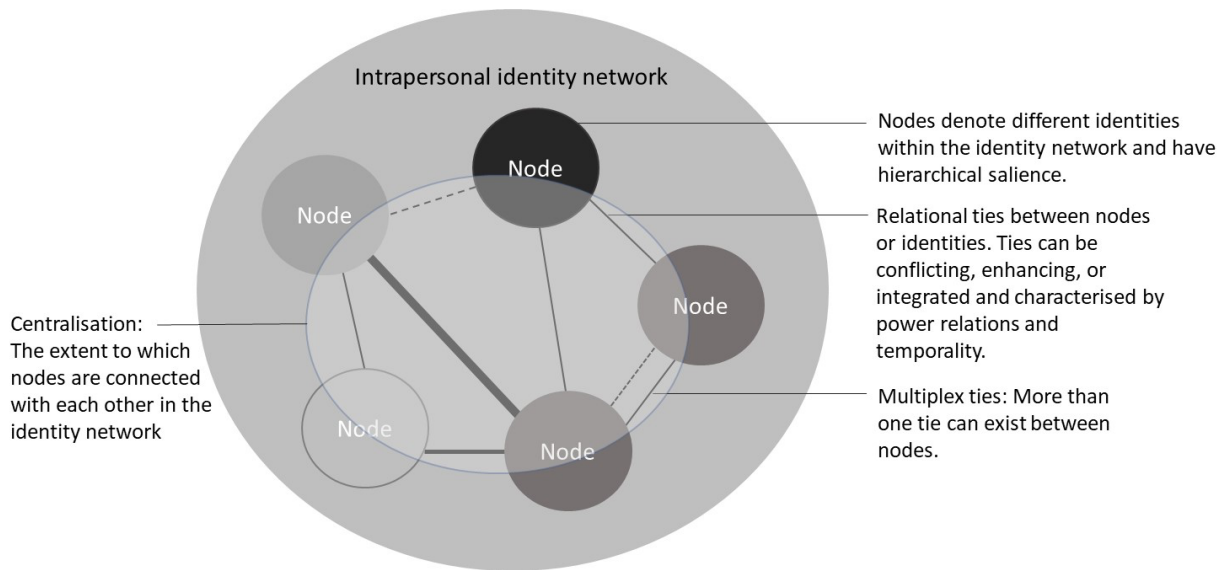


Figure 6
Intrapersonal identity network according to Ramarajan (2014)

Ramarajan (2014) argued for the need to consider multiple identities and the relationships amongst these identities and the intrapersonal identity network was developed in response to this identified need. Ramarajan, Berger and Greenspan (2017) also emphasise the importance of focusing on multiple identities in research on identity work and according to Bataille and Vough (2022) the existing research on identity work is limited due to the dominant focus on individual identities.

Bataille and Vough (2022) applied Ramarajan’s (2014) intrapersonal identity network approach in the context of identity work that takes place in response to opportunities and threats. Bataille and Vough (2022, p. 93) argue for the increasing need to understand “the processes through which employees construct and alter their identities over time” due to the increasing complexity of the organisational environment (Ibarra & Obodaru, 2016). In the following section, the key concept of “identity work” is further elaborated upon.

2.6. Identity work

The most cited definition of identity work is that it entails “people being engaged in forming, repairing, maintaining, strengthening or revising the constructions that are productive of a sense of coherence and distinctiveness” (Sveningsson & Alvesson, 2003, p. 1165). Identity work takes different forms and is experienced differently with different outcomes. There have been multiple attempts to specify ‘generic’ processes of identity work, though there is “little

consensus” in this regard (Brown, 2017, p. 24). Scholarship on identity work differs on the temporal nature of identity work, the degree of identity coherence and enduring nature, the frequency of identity work, the experience of and the depth or breadth of identity work.

Some authors acknowledge that the sub-identities have a dynamic interplay with the overall self-identity. One view of identity work is that it is the “cognitive, affective, and/or behavioural tactics undertaken by an individual to create, present, and sustain personal identities that are congruent with and supportive of the self-concept”(Snow & Anderson as cited in Hammond et al., 2017, p. 484). Snow and Anderson’s (1987, p.1348) long standing conceptualisation stands as that of identity work being “the range of activities individuals engage in to create, present, and sustain personal identities that are congruent with and supportive of the self-concept”.

The predominant view in the literature is that identity work seeks to gain some coherence in self-identity. Through processes of identity work, people craft identity narratives (Bardon et al., 2017, p. 3). Identity work, whether intra- or extra-organizational, underscores a drive for “stability, equilibrium, and predictability” (Lutgen-Sandvik, 2008, p. 114). Individuals are motivated to maintain and enact their identities in their current state in order to achieve a sense of stability and continuity over time (Petriglieri, 2011). Watson (2008, p.129) has argued that “identity work involves the mutually constitutive processes whereby people strive to shape a relatively coherent and distinctive notion of personal self- identity”.

Identity work once seen as having only “vague influence” (Alvesson & Willmott 2002, p. 625), is now recognised to be directly related to various individual and collective processes and outcomes (Brown, 2017) within an organisational context. Studies on identity work continues to become more prominent in identity scholarship (Petriglieri et al., 2019) and there remains a gap to build a comprehensive understanding of identity dynamics in organisations (Caza, Vough, & Puranik, 2018).

In an organisational context, Brown (2017) argues that there is a dynamic exchange and interplay between the multiple sub-identities of a middle manager that in turn exchange with the self-identity:

Scholars note frequently that people work on different identities at different times, but the temporal relationships between these processes of identity work, and the trade-offs and sacrifices ... that may accompany these choices are virtually unexplored. (Brown, 2017, p. 31)

The self-identity remains more stable with sub-identities changing more frequently. Self-identity is constructed from a relatively stable overarching set of meanings, which change only gradually, but “identities can be acquired, lost, switched or modified much more quickly, and perhaps instantaneously as contexts and preferences alter” (Brown, 2015, p. 27). “The field lacks a deep foundation of research that investigates the process of identity and identification over time. ... we urge future researchers to consider how work identity and identification form and develop; how do their meanings change, or perhaps, get lost” (Miscenko & Day, 2015, p. 23).

Within an everchanging organisational context the identity work is intensified and even more dynamic over time. The changing organisational environment calls for identity change adaptiveness and this remains to be further explored (Wittman, 2019). There is widespread recognition of the need for further theory building and empirical research on identities and identity construction issues in organisational contexts (Alvesson & Willmott, 2002; Brown, 2019). How managers view and experience their identities matter to the organisation as it impacts their behaviours, choices, and actions.

Brown in his review (2019) states that often studies seek to identify types or strategies of mostly contextually specific examples of identity work (Brown & Toyoki, 2013; Croft et al., 2015; Petriglieri & Stein, 2012). Much remains to be understood around the temporality, the nuance of the processes and dynamic interplay of multiple identities over time. There are few studies that adopt a dynamic approach as to how identities develop over time in relation to one another (Miscenko & Day, 2015). Identity development is a dynamic phenomenon and identity work is deemed successful if individuals manage to craft identities that sustain their self-esteem and grant them social validation in their roles (Beech, 2008; Day & Harrison, 2007; DeRue & Ashford, 2010; Ibarra et al., 2010; Lord & Hall, 2005; Petriglieri & Stein, 2012).

Recent work is beginning to question whether identity work is aimed at creating coherent, validated identities (Caza, Vough, et al., 2018). Individuals seek a balance to preserve stability, continuity, and identity dynamism. They draw on multiple sources, desires and memories and sub-identity narratives to build an overarching self-identity narrative (Knights & Willmott, 1989; Sveningsson & Alvesson, 2003). Identity narratives contain edited versions of the past and preferred futures as the sub-identities have a dynamic exchange (Brown, 2019).

The process of identity work is at times vexed and stressful. Identity work is experienced differently and may be marked with experiences of uncertainty, anxiety and fear (Alvesson & Willmott, 2002). Research suggests that people respond to identity insecurities and threats

through various forms of identity work (Brown & Coupland, 2015; Snow & Anderson, 1987). Identity work stems from doubts and inconsistencies with others or oneself (Alvesson, 2010; Alvesson & Willmott, 2002). Identity work research has recognised that “valued identities are sources of pride and self-esteem, and identity voids are often filled with anxiety and hope” (Ibarra et al., 2014, p. 290).

For some, identity development involves acute status anxiety, as in the case with of the consultants in Brown and Coupland’s (2015) study on elite identity construction as a form of identity regulation. For others, there is the suppression of emotional struggles when a mismatch occurs between identities. Emotions impact a manager’s behaviour and choices and is important to consider in research to offer insights into facilitating managers’ identity work (Hay, 2014).

Several social level influences impact identity work, namely the availability and extent of social support (Hammond et al., 2017; Petriglieri, 2011). Ashforth et al. (2016) refer to the importance of a climate of psychological safety for identity work. Petriglieri (2011) points to the strength of the trigger as well as the accessibility and malleability of the source of the threat as being important. It remains to be seen which influences play a greater role in the leader identity development of managers and how they impact one another as well. Varying influences may come to the fore in different contexts in relation to different sub-identities.

There is dissension in the associated literature about the individual drivers to maintain stability as well as to adapt and to change identity, and around what leads to identity work and the frequency of identity work. There is broad agreement in the identity scholarship that identity development occurs in stages of being stable punctuated with periods of identity being re-worked (Ibarra & Petriglieri, 2010). Ironically successful identity work increases coherence and as such is a buffer against a threatening or challenging environment (Sveningsson & Alvesson, 2003). In these instances the individual may buffer out triggers to prompt identity work and equally may use the resultant identity to buffer out triggers. This is a gap in understanding around the identity development phenomenon and how identity work periods are triggered.

Identity development involves the gain or the acquisition of a new identity; or growth of an identity as it is reframed or reformed (Kreiner et al., 2009). Indeed, an identity may gain greater prominence or what is termed ‘identity salience’ or may even be exited (Ashforth as cited in Petriglieri, 2011). Hammond et al (2017) talk to identity developing in four ways; in strength, level, integration and meaning.

The overarching desire is to enhance the self-identity. The central task of identity work is “crafting, experimenting with, and revising identity narratives, or stories about the self” (Ibarra et al., 2014, p. 290). This includes “activities that individuals undertake to create, maintain and display personal and social identities that sustain a coherent and desirable self-concept” (Petriglieri & Petriglieri, 2010, p. 45). Mostly the identity work is observed as a revision of a self-narrative (Ibarra & Barbulescu, 2010). Self-narrative is insufficient in and of itself and a projected identity needs to be reinforced and legitimated by others (DeRue & Ashford, 2010).

Bataille & Vough (2022) argue for the need to rectify the current overemphasis on identity threats to also identify the importance of identity opportunities. Furthermore, the existing literature is concerned with individual identity and not multiple identities (Bataille & Vough, 2022). Bataille and Vough (2022, p. 106) state that “studies of identity work have largely overlooked how making changes to one identity impacts the relationships between identities” and argue for the development of a theoretical model that integrate both fluidity and multiplicity that reflects the complexity of identities.

2.7. Leader identity

Despite the importance of leader identity “due to its impact on cognition, emotion, and behavior, as well as its influence on the way one views, and is viewed by, self and others [...] perspectives on what leader identity is, where it resides, and how it functions diverge considerably” (Campbell, Shollen, Egan & Neilson, 2019, p. 6). Leader identities as they appear in the literature are “ambiguous, with no clear definition” (DeRue & Ashford, 2010, p. 630) and they are inherently dynamic and contextual (Brown, 2017).

Leadership is a “social process of mutual and reciprocal influence in the service of accomplishing a collective goal” (Ibarra et al., 2014, p. 285). DeRue and Ashford (2010) refer to a leadership identity as comprising the three elements of individual internalisation (of either leader or follower identity as part of one’s self-concept), relational recognition (by both leaders and followers in the relationship), and collective endorsement (as members of a specific social group of leaders or followers) (Ford, 2020). There is a social relational exchange implicit in a leader identity and the role and context cannot be ignored. “Identities are living narratives that give the self a history and aspirations; help it appraise its experiences; bind it to groups and discourses; and give motives, meaning, and value to its pursuits” (Petriglieri et al., 2018, p. 481).

Epitropaki, Kark, Mainemelis, & Lord (2017) view leader identity as a sub-component of one's working self-concept, which includes leadership schemas, leadership experiences and future representations of oneself as a leader. Research exploring leader identity is therefore underpinned by the view that multiple sub-identities exist.

2.7.1. Leader identity as a sub-identity of managers

Leader identity and managerial identity are sub-identities and are conceptualised in the individual identity scholarship as nested in self-identity. Atewologun et al. (2017) conducted a systematic review of 253 articles from over 30 top management journals between 2005 and 2016 from which they identify nine categories of individual-level identification foci: manager, leader, follower, team, organisation, occupation-specific, professional, career and work (Atewologun et al., 2017). See Figure 7 below which highlights how an individual identity comprises multiple sub-identities.

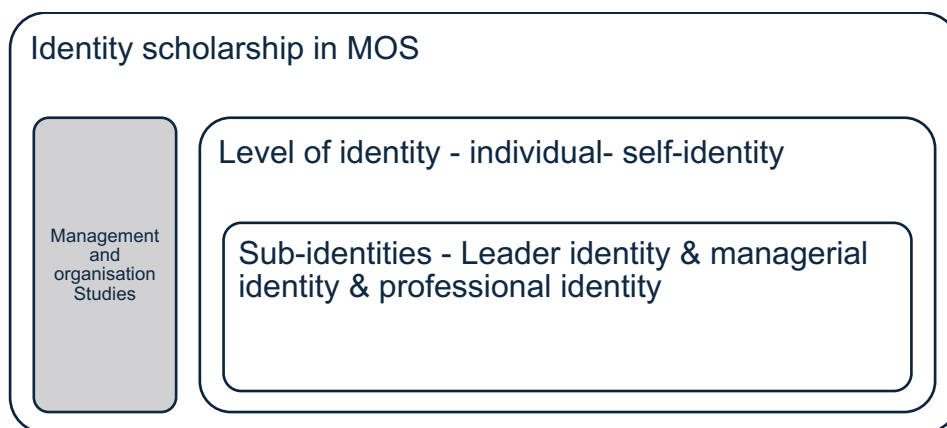


Figure 7

Nested Identity Scholarship (author's own figure)

Importantly Atewologun et al. (2017) find that managerial identities can occur prior to and simultaneously with leader identities, and that this is an under-researched relationship. In particular, for a manager who holds these multiple identities, the interaction between the leader identity and self-identity is less known.

Day and Harrison (2007) define leader identity as a sub-component of one's working self-concept. Atewologun et al. (2017) define leader identity as “an individual’s sense of self as someone who can guide others’ work and who receives acknowledgement of that ability from those one guides as well as the organization” (2017, p. 285). These authors (Atewologun et

al., 2017) distinguish this from managerial identity as “an individual’s sense of self in the context of doing managerial work that is influenced by organizational and social discourses concerning what managers do and how they behave”. Both sub-identities co-exist and engage with the self-identity development.

2.7.2. Leadership narratives and the tension between leader identity and managerial identity

It is not easy to maintain a clear distinction between leader identities and managerial identities, but often leadership is understood as being about management of meaning, including some granted leadership authority, has an informal element, and concerns influencing thinking and feeling, whereas management is a more formal process associated with a holder of formal authority (Alvesson, 2020). This formal authority may come in a role.

Tensions between managerial identities and professional identities have been noted in the literature (Croft et al., 2015; Watson, 2009). Yet exactly how specific work-based role, collective, or personal identities are integrated into an overall work-based self-concept and what contextual characteristics impact this process has not been thoroughly explored (Caza, Vough, et al., 2018).

Researchers have long sought to uncover the identity work that accompanies role transitions but still ‘the process by which identity evolves remains under explained’ (Ibarra, 1999, p. 765). The transition to take on a new managerial role and to construct a managerial identity and leader identity has been explored in the literature of this field (Komives et al., 2005). Notably authors study the managerial identity (Clarke et al., 2009; Cunliffe, 2001; Sveningsson & Alvesson, 2003; Watson, 2009) and leader identity separately (Hammond et al., 2017; Ibarra et al., 2014; Middleton et al., 2019; Miscenko et al., 2017; Sinclair, 2011). Yet a manager holds multiple identities and the sub-identities interact over time and this impacts overall identity development.

Jarventi-Thesleff & Tienari (2016) elucidated how roles mediate identity work and are continuously evolving in relational processes which goes some way in helping us understand the dynamic interplay between roles and sub-identities and identity development over time. The authors conducted research on role transitions over time during a change initiative and how identities subsequently evolved. “Trade-offs” were made as multiple sub-identities held tensions between them. The individuals developed expert identities, which led to the

experience of holding outsider identities, which prompted insecurity and the further development of identity.

Organisational roles and their associated meaning and expectations evolve over time, and these roles partially inform the identity work of the role incumbent as organisational and social interactions reinforce or counter these meanings and expectations. The identity development of the individual in turn affects the meaning of the role. Meanings associated with roles co-evolve with identity meanings and mediate identity work (Järventie-Thesleff & Tienari, 2016). Individuals experience intra and inter role transitions and identity work amongst and between sub-identities. As identity develops so the role meaning is informed too, and individuals may then hold contrasting identity narratives. Managers confront contrasting meanings, demands and expectations in their roles as they work between their managers and employees and stakeholders, each of which evolve over time. As such the manager undergoes identity work as they experience micro intra role transitions.

Managers in organisations are drawn to adopt a positive leader identity and to maintain an image of themselves as leaders. Managers face this tension as the leadership narrative is seen as preferred and ideal, and even meaning 'grandiose' leadership behaviours (Alvesson & Sveningsson, 2003a, p. 982). The leader identity is at odds with a great deal of every day managerial work and it leads to "temporary, fragmented identity constructions with weak implications for behaviour" (Alvesson & Sveningsson, 2003a, p. 982). The irony then is that the very promise of the positive impact of good leadership of managers results in the lack of leadership behaviour.

Leadership can be understood as a process of interpersonal influence towards organizational goals, which occurs precisely in the midst of those mundane work activities, constituting management (Larsson & Lundholm, 2010). A critical school of thought proposes that leader identity is the work of fantasy (Sveningsson & Larsson, 2006) and leadership is the extraordinary of the mundane (Alvesson & Sveningsson, 2003b). "The significance of the formal position as manager is vital for this framing, thus making the distinction leader/manager problematic" (Alvesson & Sveningsson, 2003b, p. 1454).

"Leadership, as widely envisaged, is a key part of the problems we now face rather than the solution" (Tourish, 2014, p. 80). Managers, and particularly senior executives, do not emerge well from the perspective of public and employee opinion, being seen as partly responsible for increasing inequalities, overmanaged organizations, impoverished work conditions, and an often-cynical workforce (Alvesson, 2020).

Alvesson (2020), in his critique of leadership studies over 40 years states that 'upbeat' or positive leadership studies may have brought self-confidence and self-praise to the field however this has little bearing on the criticisms of leadership and the reality of work life. He suggests that a 'recipe;' has been followed for articles to be published that reinforce such positive findings and approaches, and these do not stretch and build sufficient relevant and insightful studies in the field.

Interestingly this critical scholarship does not negate that leader identity or related behaviours exist, even if their overly positive identity obfuscates the damage they incur. "Leadership may appear as an ideological—more than a practical—solution. It offers identity, status, and legitimation support through promises of moral goodness and grandiose action" (Alvesson, 2020). It is noteworthy that leader identity holds sway and is revered in organisations and how managers aspire to build their leader identity. The critique asks for the 'upbeat' field of leadership studies is to be opened up to a more nuanced approach, critique and even problematisation in organisation studies.

Leadership is a contested construct and at times seen as overly positive and as fantasy in a manager's role. Yet it continues to feature prominently in management and organisation studies and is indeed a growing concern as so-called leaders deliver fractured and corrupt toxic organisations, far from the positive results promised. Leader identity underpins the related behaviours and choices, and this forms a part of a managerial identity. Rather than ignore or dismiss leader identity, this warrants further attention if we are to better understand under what circumstances leader identity is triggered, or not, and how it is developed in managers in relation to the other identities.

A view emerges in the literature that all our selves are always, at least potentially, provisional. The identity scholarship has found that individuals hold simultaneously different versions of their sub-identities. Different identities are activated at different times, and they are compared and contrasted. Ibarra (1999), for example, is widely cited in her work on defining provisional selves, which is a way we hold a version of our identity as we transition roles.

Future research is required to investigate how antagonisms between sub-identities impact overarching identity and the influence this has on performance in organisations (Clarke et al., 2009, p. 347). Along the social constructionist and interpretivist spectrum of literature, scholars have found that the managerial identity does co-exist with a leader identity and that managers

default to their managerial identity to find a sense of coherence and stability (Carroll & Levy, 2008). Then the question remains as to how leader identity develops in managers.

A focus on the interaction between identities and these dynamics is key to understanding managers development of their leader identity and self-identity. The comparison and tensions between sub-identities and versions of self-identity prompt identity development. The more we understand which identities are activated and the interplay and comparisons between these identities, the more we can understand identity development in general and leader identity development in particular.

Not only are the dynamics important but also how the dynamics evolve over time is equally important, for example, it has been found that identities may remain unresolved in work transitions. The dynamic interplay between identities may lead to lingering identities that prevent identity development. Wittman (2019) defines lingering identities as those identities that are premised on former roles that persist significantly beyond role change. Individuals hold different versions of the sub-identity within their overarching self-identity. If these persist in sub-identities this impacts the self-identity and further research is warranted to explore the dynamics of identity development over time.

Rather than argue around the distinction of the role and behaviours of managers versus leaders, I posit, based on the literature review, that the manager holds a role incorporating multiple sub-identities, including a leader identity. In particular, leader identity development may be triggered, and this phenomenon requires further attention particularly in the context of the dynamic interplay of multiple identities of managers over time.

2.8. Leader identity development

Leader identity development for managers can be defined as the process through which individuals acquire, internalise, and validate a leader identity and refine, revise, and enact their other identities to minimise conflict with the leader identity and maximise group prototypicality (Ibarra et al., 2014). When an identity is salient and clear, individuals seek out opportunities to “enact and develop that aspect of the self” (Epitropaki et al., 2017, p. 120).

The processes of leader identity development of managers involve multiple sub-identities, fluidity, and context-specific reactions. The idea of identity as “multiple, relatively fluid and highly contextual” (Ibarra et al., 2014, p. 291) is especially pertinent for the study of

management in the current dynamic context. There are many triggers to identity development that the impact on leadership behaviour is not predictable. Identity development may take place quickly and it may also involve a loss of identity (Kreiner et al., 2009). Yet a large cohort of the identity literature claims that a developed leader identity is needed to fuel the drive and motivation to lead and to build perceived leadership effectiveness (Day & Sin, 2011). Leader development is inherently longitudinal, involving a process by which leaders acquire relevant experiences, skills, behaviours, and knowledge over time (Lord & Hall, 2005).

A gap exists in the literature to explain why the results in identity development differ between managers. “Why in different circumstances and at different times some people engage in identity work that leads to positive identification and become zealots for it, while others manifest dis-, schizo- or neutral identification is still largely mysterious” (Brown, 2015, p. 32). In addition, why managers fail at developing their leader identity is not clear (Alvesson & Sveningsson, 2003a).

Also, less clear is whether the identity work leads to greater or lesser identity development. “More radical changes can occur either where there is an accumulation of micro changes ...or where there is a revolutionary change in which one set of meaning giving tensions is supplanted by another. Hence, efforts to ‘manage the inside’ could either be through revolutionary rites of passage which shift a whole set of tensions or could be more subtle and gradual by altering the balances of individual tensions over time” (Beech, 2008, p. 68). Different dynamics could lead to different identity responses at different points in time as identity development is not linear. The overarching identity development over a period could look quite different at different points in time during this period.

Leader identity development of managers undergoes various iterations over time depending on various influences. As indicated in Figure 8, the identity development phenomenon is prompted by potential identity triggers, which are appraised by the individual as either identity triggers or not. If they are deemed as identity triggers, then the individual experiences identity work. Various identity responses emerge, one of which may be identity change or development.



Figure 8

Aspects of leader identity development

Figure 8 indicates how the author has clustered the four key concepts related to identity development phenomenon, namely the potential identity trigger, the appraisal of the identity trigger, identity work and the identity response. The figure is not intended to be a framework or model or to indicate any linear sequences or causal relationships. In the following sections these four concepts are discussed and clarified with reference to the literature.

2.9. Theoretical models on leader identity development

2.9.1. A theory of leader development across multiple domains

Hammond et al. (2017) proposed a theory that considers both leader development content and process. The authors state that despite various studies focusing on single leadership domain development, very few studies consider two or more domains and what developmental processes take place at the intersection of different domains. Although scholars (Bartel, Saavedra & Van Dyne, 2001; Riggio & Mumford, 2011) recognise the importance of cross-domain processes for leader development and their research suggest cross-domain leadership development with benefits extending across the lifespan, the process and content of what is developed has not been explored (Hammond et al. 2017).

Their theory considers multiple domains within a sense-making framework and they “describe how leaders first notice and subsequently interpret cross-domain connections and disconnections, leading to changes in their identity with respect to strength, integration, meaning, and level” (Hammond et al., 2017, p. 481). According to Hammond et al. (2017) the identity changes lead to a development in the depth and breadth of leader competence. They additionally consider how multiple domains are impacted through an interweaving process of sensemaking (Hammond et al., 2017). The theoretical model proposed by Hammond et al. (2017) is depicted in Figure 9.

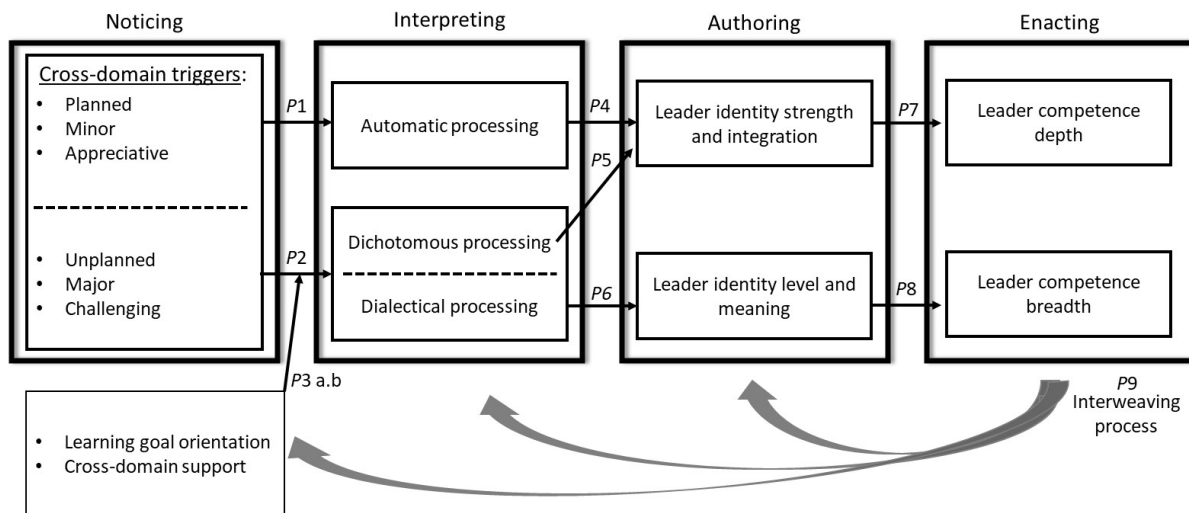


Figure 9

Theoretical model of cross-domain leader identity development (Hammond et al. 2017)

As indicated in Figure 9 there are four components to the process of sense-making in this theoretical model: noticing, interpreting, authoring, and enacting. Noticing refers to cues (also referred to as “triggers”) that a leader becomes aware of and prompt the leaders to start an attempt to interpret the experience. The trigger can be perceived as being planned, minor or appreciative or unplanned, major and challenging. According to Hammond et al. (2017) these differentiators should not be seen as dichotomous categories. For example, an event can be experienced as planned and minor yet also be challenging.

An important aspect of noticing highlighted by the authors is the awareness of the leader of possible connections or disconnections across domains. This means that the leader recognises that an aspect of his or her leadership has applicability (or not) in another domain. Hammond et al. (2017) highlight six dimensions of possible connections or disconnections related to leadership: goal of leading, purpose of leading, culture and values associated with leading, feelings associated with leading, and skills and behaviours applied in leading.

Hammond et al. (2017) describe interpreting as the cognitive process that occurs attaching meaning. The events that were noticed are now being understood based on the initial interpretation of connections and disconnections and are framed as an emerging narrative. This cognitive processing takes place in different modes. Automatic processing relies on existing schema to make sense of connections and disconnections across domains (Hammond et al., 2017).

Conscious processing is the active and mindful consideration of, and reflection on, context and content and is required “when events are perceived to be dissimilar, contradictory, or seemingly incompatible”. (Hammond et al., 2017, p. 487). This would, for example, be the processing strategy to consider disconnections whilst the consideration of connections might prompt automatic processing.

When dichotomous thinking is applied categorisation of opposites take place which Hammond et al. (2017, p. 488) describe as using an “either/or, black/white, all-or-nothing approach which highlights the dissimilarities across domains and stresses their perceived irreconcilable elements”. Dialectical thinking on the other hand is based on the acceptance of contradictions and the dynamic tension between contradictions is explored crossing the binary opposition between contradictions (Hammond et al., 2017). The authors state that “resolutions of interpreting disconnections processed through dialectical thinking produce broader meanings in which the dynamic tensions of disconnections are viewed as mutually reinforcing relationships rather than polarities” (Hammond et al., 2017, p. 487). Hammond et al. (2017, p. 487) propose the following:

Triggers noticed as connections will tend to be processed automatically.

Triggers noticed as disconnections will tend to be processed consciously and will involve dichotomous and/or dialectical thinking strategies.

Hammond et al. (2017, p. 488) highlight two moderators of the disconnection-conscious processing relationship “to explain which type of cognitive strategy leaders are most likely to use” namely, learning goal orientation and cross-domain social support. Hammond et al. (2017) applies the definition of learning goal orientation of Van de Walle, Cron, and Slocum (2001, p. 630 as cited by Hammond et al., 2017, p. 488): “a focus on developing one’s competence by acquiring new skills, mastering new situations, and learning from experience”. Based on a review of the literature (Boyce, Zaccaro & Wisecarver, 2010; Dweck, 1986; Payne, Youngcourt, & Beaubien, 2007; Yeo & Neal, 2004 as cited by Hammond et al. 2017) Hammond et al. (2017, p. 489) argue that a learning goal orientation explains adaptive behaviours that allow leaders to thrive in challenging contexts and that these leaders “are more motivated and skilled at leader self-development”. Hammond et al. (2017) propose the following:

Learning goal orientation moderates the relationship between noticing and processing disconnections such that leaders with stronger learning goal orientations are more likely to engage in dialectical thinking than in dichotomous thinking. (p. 489)

Cross-domain social support refers to “high-quality relationships within the domains and opportunities leaders have for open and honest dialogue” (Hammond et al, 2017, p. 489). Such relationships (for example, coaching and/or mentoring relationships) provide a space within which a leader can be challenged and supported to actively process experiences and develop deeper understanding of their own leadership. Hammond et al. (2017) propose the following:

Cross-domain social support moderates the relationship between noticing and processing disconnections such that leaders with greater support are more likely to engage in dialectical thinking than in dichotomous thinking. (p. 489)

The process of authoring (Hammond et al. (2017) also refers to identity work as authoring) “represents an articulation of a leader’s personal narrative in light of identified meanings of cross-domain connections and disconnections” (Hammond et al., 2017, p. 489). With reference to Brown et al. (2015) and Ibarra and Barbulescu (2010) (as cited by Hammond et al., 2017, p. 489) authoring is described as the “creation, articulation, and narration of the stories that depict the situations and self in relation to individuals’ understandings” and “involves not merely interpretation and meaning production but the active authoring of the situations in which reflexive actors are embedded and are attempting to comprehend” (Brown et al., 2015, p. 267).

When events are processed automatically, it leads to the reinforcement or strengthening of the positive self-image of a leader (Hammond et al., 2017). When a leader interprets connections across domains it allows for leader identity to become stronger and integrated into domains other than the domain in which the leader identity was originally developed (Hammond et al, 2017). When dichotomous processing takes place, it leads to a weakening of leader identity. Hammond et al. (2017) propose the following:

Automatic processing of connections is related to strengthening and integrating one’s leader identity.

Dichotomous processing of disconnections is related to weakening and splintering one’s leader identity. (p. 490)

When dialectical processing is applied, leaders accept, interpret, and integrate contradictions and actively reinterpret an event into a coherent narrative (Hammond et al., 2017). They propose the following:

Dialectical processing of disconnections is related to growing the inclusiveness of one’s leader identity and to broadening one’s meaning of leadership. (p. 490)

Enacting refers to the taking of action based on the meaning derived from the authoring stage – “enacting involves acting on one’s authored leader identity” (Hammond et al. 2017, p. 490). This can either entail a deepening or broadening of leader competence (Hammond et al. 2017). Hammond et al. (2017) propose the following:

Strength and integration of a leader identity will promote the development of the depth of existing knowledge, skills and abilities. (p. 491)

Growing levels and meaning of a leader identity will promote the development of the breadth of knowledge, skills, and abilities. (p. 492)

2.9.2. Identity network-based model of responding to identity-implicating experiences at work

By applying Ramarajan’s (2014) intrapersonal network approach to identity work, Bataille and Vough (2022, p. 106) helps contribute to an understanding of “how making changes to one identity impacts the relationships between identities”. Through this application they integrate both fluidity and multiplicity of identity and identity work in a theoretical model that reflects the complexity of identities. See Figure 10 below.

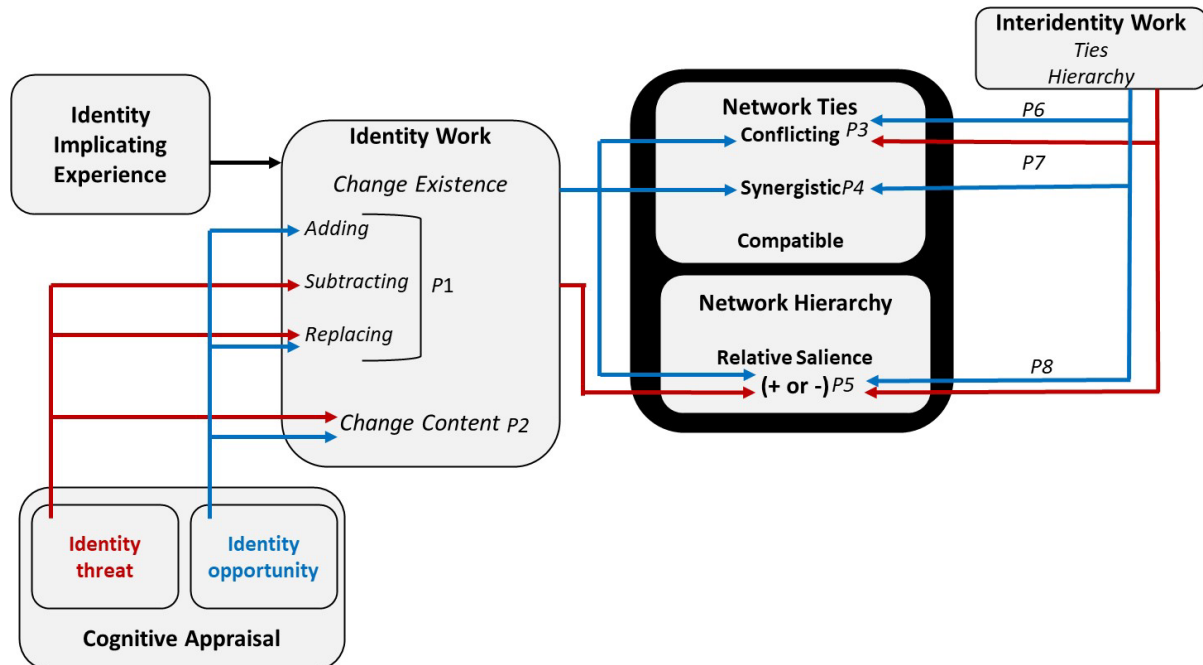


Figure 10

Theoretical model of identity development through the lens of an identity network (Bataille and Vough, 2022)

Bataille and Vough's (2022, p. 96) model starts with an identity implicating experience which they describe as an event that prompts the individual to relate something in the experience to "who they are: what does this experience say about me or mean for who I am"? The experience is appraised cognitively to determine whether the experience indicate a threat to identity or an opportunity for identity or a combination of the two. Depending on this appraisal, the individual will have varying responses. According to Bataille and Vough (2022) there are two types of identity work and two types of interidentity work as indicated in Figure 11.

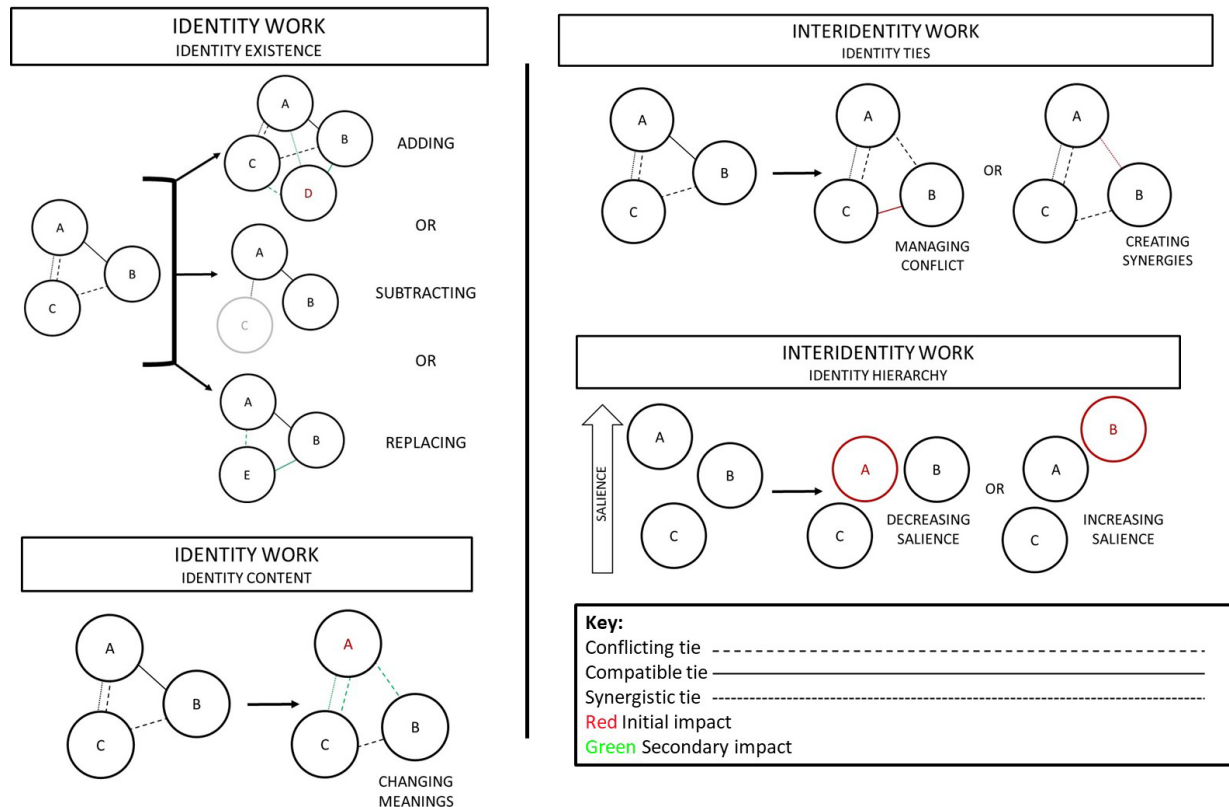


Figure 11
Types of identity work (Bataille & Vough, 2022)

Bataille and Vough (2022) argue that the identity work that one is engaged with does not only impact on the focal identity but also has implications for the identity network. This could entail changes to the relationship between identities and/or changes to other identities in the identity network.

Identity work can aim at changing the existence of identities by either adding, subtracting, or replacing identities (see Figure 11 above):

According to Bataille and Vough (2022), identities are subtracted from the identity network when the individual no longer associates with a particular identity. Petriglieri (2011) states that subtracting is often the response to an identity threat. Adding takes place when a new identity is introduced into the identity network and is the response associated with identity opportunities: “Individuals experiencing opportunities will work toward developing desired identities that they do not hold yet (Bataille & Vough, 2022, p. 100). When subtracting and adding take place simultaneously, identity replacement Bataille and Vough (2022) takes place, and one identity is replaced with another whilst the total number of identities do not change. Replacement can be the response to identity threats and opportunities (Bataille & Vough, 2022).

Bataille and Vough (2022, p. 101) describe identity content as the “what of identity”. In other words, content refers to the thoughts an individual holds about himself or herself and includes the “behaviours that are motivated by those thoughts”. Petriglieri (2011) also includes the values, meanings, and enactments of a particular identity. According to Bataille and Vough (2022) whether an identity implicating event is viewed as an opportunity, or a threat will most likely have an impact on the identity work that takes place.

Identity work can focus on changing the ties between identities in the network (see Figure 11). Bataille and Vough (2022) refer to this type of work as inter-identity work. According to Bataille and Vough (2022, p. 102) the impact of identity work extends to the identity network ties and “can change whether identity ties are characterized by conflict, compatibility, or synergy”. Conflicting ties can increase as a response to both identity threats and opportunities since “the new identity that replaces another identity may conflict in some ways with existing identities” (Bataille & Vough, 2022, p. 102).

Subtracting an identity could reduce conflicting ties in the identity network because “any conflicts that previously existed between the subtracted identity and other identities in the network disappear” and “any resources that were consumed by the focal identity are relinquished and made available for other identities” (Bataille & Vough, 2022, p. 102). Whether an individual views an identity implicating experience as a threat to identity or an identity opportunity will impact the identity hierarchy of an identity network (Bataille & Vough, 2022). If an identity in the network is perceived to be less desirable, the salience of this identity is decreased within the identity network (Bataille & Vough, 2022). However, if an identity is regarded as positive and represents identity opportunity, the individual is more likely to increase the salience of this identity (Bataille & Vough, 2022).

According to Bataille and Vough (2022, p. 103) inter-identity work is applied “to address any conflicting ties that emerge in the identity network as a result of identity work”. Bataille and Vough (2022) hypothesise that the type of inter-identity work that individuals engage in will be influenced by whether an identity implicating experience is viewed as a threat or an opportunity. The broad type of inter-identity that this entails, is referred to as “boundary work” (Bataille & Vough, 2022, p. 104) where boundaries refer to the “cognitive or behavioural fences that exist between individuals’ life roles or identities” (Zerubavel, 1991 as cited by Bataille & Vough, 2022, p. 104).

Bataille and Vough (2022) highlight two types of boundary work: cognitive segmenting, behavioural segmenting, and integration. Cognitive segmenting relates to the avoidance of “simultaneously thinking of themselves in terms of competing or contradictory identities” to reduce conflict. Behavioural segmenting entails the creation of “physical or temporal boundaries between the enactment of identities” (Nippert-Eng, 2008, as cited by Bataille & Vough, 2022, p. 104) and assist individuals to determine when and what “resources should be dedicated to each identity” (Bataille & Vough, 2022, p. 104) to decrease conflict. According to Bataille and Vough (2022, p. 104) cognitive and behavioural segmenting “turn conflicting ties into more compatible ties”.

When an individual identifies identity opportunities, they would engage in another type of boundary work, namely, integrating. “Integrating involves blurring the distinctions between identities by undoing cognitive barriers and creating cognitive connections between them” (Zerubavel, 1991 as cited by Bataille and Vough, 2022, p. 104). Furthermore, Bataille and Vough (2022) argue that when an identity implicating experience is seen as an identity opportunity, individuals tend to become more aware of synergies and actively seek and find connections between identities whilst the experience of an identity threat will be less likely to become aware of potential synergies.

When there is an attempt to change the salience of a hierarchy, individuals may engage in “activation cuing” (Bataille & Vough, 2022, p. 105). Activation cuing involves taking steps to ensure that an identity will (or will not) be activated in a particular context. Bataille and Vough (2022) refer to the example provided by (Pratt & Rafaeli, 1997) by using an identity marker such as the way in which an individual dress to signal the activation of a particular identity. According to Stryker (1980) and Stryker and Serpe (1982) as cited by Bataille and Vough (2022, p. 105) “individuals can also cue the activation of an identity by developing relationships and participating in communities that are relevant to that identity”.

2.10. Leader identity development process

2.10.1. Triggers as identity-implicating experiences

Within an organisational context individuals have numerous experiences that can prompt reflections on identity. These triggers may also be referred to as identity implicating experiences. According to Bataille and Vough (2022), identities implicated by triggers could be associated with the past, the present or the future and may also originate from intrapersonal processes (Petriglieri, 2011). Triggers could be subtle or dramatic (Alvesson et al., 2008; Bataille & Vough, 2022) and could occur along three different dimensions: planned/unplanned, appreciative/challenging, and major/minor (Hammond, Clapp-Smith, & Palanski, 2017) which can lead to either protective or identity restructuring responses (Hammond et al., 2017). Hoffman and Lord (2013) outline a taxonomy of seven event dimensions: “micro vs macro, static vs dynamic, familiar vs novel, extraordinary vs ordinary, positive vs negative, relevant vs irrelevant, past/future/present orientation” (p. 559).

According to identity theory, identity is a fairly stable entity which changes when induced by external shocks or events (Miscenko et al., 2017; Miscenko & Day, 2015). Many scholars attend to the identity work that occurs in particularly demanding situations or at “times of significant transition” (Brown, 2015, p. 24). It has been argued that different kinds of transitions (micro/macro; intra/inter) impact identities of individuals in different ways. Organisational changes were, for example, found to affect workers’ expectations and trigger major revisions of individual narratives to reconnect past experiences and future expectations (Reissner cited in Miscenko & Day, 2015, p. 11).

Obodaru (2012) refers to turning points as triggers of identity development. “Turning points are events that create shifts in the meaning, purpose, or direction of a person’s life. What gives an event the significance of a turning point is the subjective meaning the individual assigns to it in retrospect” (Obodaru, 2012, p. 39). In other words, it is the subjective interpretation of a trigger which prompts identity work. Obodaru (2012) writes on alternative selves that are brought to our attention when we consider who we could have been given different circumstances, be they under our control or not.

Regardless of the nature of the triggering experience, to be regarded as an identity implicating experience “the individual must relate something in the experience to who they are” (Bataille & Vough, 2022, p. 96). Bataille and Vough (2022, p. 96) refer to the term used by Louis and

Sutton (1991) and state that identity implicating experiences lead to “active thinking” about identity. Active thinking entails making a cognitive appraisal to make meaning of the experience (Hammond et al., 2017).

2.10.2. Appraisal of triggers

Triggers prompt the leader to notice and bracket information from a situation and to make initial sense of the cues so that interpretation may begin. Appraisal refers to giving an interpretation or meaning to an event or trigger as having an anticipatory impact on identity.

Individuals in organisations are confronted with an array of identity triggers at any one time and the literature does not address whether individuals appraise triggers sequentially or whether triggers are amalgamated and appraised collectively. Also, the same identity triggers may be experienced differently at different times (Petriglieri, 2011). Longitudinal research is needed to understand identity development trajectories in the context of everyday experiences (Middleton et al., 2019). Research has shown that identity triggers and threats can lead to decreased performance and a lower will to take on leadership roles (Epitropaki et al., 2017, p. 122).

Leader development interventions can trigger self-reflection and awareness of one's identity, which, in turn, may cause one to doubt one's leadership capacity – at least initially (Miscenko et al., 2017). There is also a need to better understand the influence of the different triggers on different sub-identities at different points and how this impacts a managers' overall self-identity identity development over time.

A primary appraisal determines whether events and experiences are triggers to identity and the secondary appraisal determines the identity work response (Petriglieri, 2011). Identity work, it seems, is more necessary in situations where strains, tensions and surprises are prevalent, as these “prompt feelings of confusion, contradiction and self-doubt, which in turn tend to lead to examination of the self” (Brown, 2015, p. 25). Individuals appraise an event or issue as a trigger when it is ambiguous, or significant to them or when it clashes with expectations or leaves an individual feeling insecure (Maitlis & Christianson, 2014).

Identity triggers may be conceived of along a spectrum of severity of potential impact on identity. One form of identity trigger is an identity threat that Petriglieri (2011) defines as “experiences that are appraised as indicating potential harm to the value, meanings, or

enactment of an identity” (p.644). Research has shown that when identity is threatened, people respond by working to alleviate the uncertainty through identity work. An identity threat, according to Brown and Coupland (2015; p.4), is “a discursively constituted thought or feeling that challenges one of an individual or group’s preferred identity narratives”.

The research contribution made by Brown and Coupland (2015) is to demonstrate that professionals use identity threats to craft their ideal identities. They interpret events which prompt them to search for more clarity and a greater sense of identity. The literature has differing views on the degree of agency that an individual has in addressing identity triggers. At times, triggers lead to greater identity regulation and control by the organisation, in which case an individual has lesser agency (Gill, 2015).

Despite the literature pointing to a range of identity triggers, “scant attention has (also) been paid, however, to what happens in between an identity-threatening experience and its consequences — that is, to the process by which individuals recognize an experience as identity threatening, assess its impact, and decide how to respond to it” (Petriglieri, 2011, p. 642). If we could better understand the appraisal of triggers, we could better understand under which circumstances identity development occurs when they are present.

Researchers should focus not on the ‘experience’ but on its construction or narrative of the perceived consequences on identity (Petriglieri, 2011). Identity threats do not always debilitate or catalyse change (Brown et al., 2019; Kreiner et al., 2009). Identity triggers pose an opportunity or a challenge to identity depending on the appraisal.

There is agency in crafting an identity or developing an identity positively response to potential identity triggers or threats (Brown & Coupland, 2015). This finding is in contrast with the proposal that the appraisal leads to identity-restructuring responses which move to eliminate the threat (Petriglieri, 2011).

The theoretical model of Hammond et al (2017) (see Figure 9) is focused on how leaders develop across domains such as family, community, and work, which requires the interpretation of triggers in these domains such that it leads to four different levels of identity development, in strength, integration, level and meaning. The model demonstrates an advance in scholarship in unpacking the phenomenon of identity work of leaders from noticing, interpreting (appraising) and authoring (responding) and enacting for the purposes of leader development across domains. This examination of the leader identity development phenomenon clarifies how the interpretation process leads to different identity development

responses. However, this framework is limited to cross domain leader identity development since managers' appraisals of identity implicating events in organisations is complex and warrants further research, as they confront organisational role demands, multiple triggers, multiple sub-identities, follower, and manager social engagements which further influence the identity appraisal. Holding these conflicting sub-identities may lead to strengthening or entrenching of an identity, and not necessarily a change in identity meaning. This is counter to the framework of Hammond et al (2017).

Petriglieri (2011) suggests that the threat source and strength also influence the appraisal, and further states that the identity implicating experience is also evaluated in terms of whether the source is accessible, the strength of the experience in question and the malleability of the source. A further exploration of the multiple influences, and the interplay of the dynamics of appraisals and responses is warranted for managers, in particular.

Individuals use primary appraisals to categorise triggers as stressors as a potential challenge or benefit and they use secondary appraisals to activate responses to the trigger (Wittman, 2019, p. 726). Similarly, Bataille and Vough (2022) acknowledge that a wide range of identity implicating experiences exist but argue that these experiences are appraised in terms of whether it is a threat to identity or an opportunity at play.

Bataille and Vough (2022) define cognitive appraisals as "attempts to understand experiences and the implications of those experiences" and can firstly be viewed as an identity threat which Petriglieri (2011, p. 644) defines as "an experience appraised as indicating potential harm to the value, meanings, or enactment of an identity".

Secondly, an identity implicating experience can be assessed as an opportunity for growth and development which Bataille and Vough (2022, p. 97) refers to as "identity opportunities": "An identity opportunity is an experience appraised as indicating potential for growth in the value, meanings, or enactment of an identity".

Bataille and Vough (2022) make the important point that appraisal is not final or definitive and that an experience can be appraised and reappraised and use the example provided by Petriglieri (2011, p. 654) that a threatened identity could be reappraised as "an opportunity to pursue a long-held ideal identity". Bataille and Vough (2022) stress the importance of considering whether an identity implicating experience is appraised as an identity threat or opportunity because of the wide range of emotional, cognitive and behavioural responses of employees. Furthermore, they predict that "appraisals of identity threat [as opposed to] identity

opportunity would be coupled with differing emotional responses and their resultant images of possible future selves” (Bataille & Vough, 2022, p. 97). For example, when an experience is appraised as a threat, the individual might experience fear toward an undesired future self as opposed to experiencing hope and excitement of developing a desired future self.

Furthermore, the emotional states triggered by the appraisal have direct impact on cognitive processing. Bataille & Vough (2022, p. 98) argue that individuals will be less cognitively flexible and creative when an experience is appraised as a threat and predict that “individuals experiencing an identity threat will be rather narrow in their search for responses to the threat and will rely on existing and available information rather than search for new information or creative responses”.

Positive emotions are associated with assessing an experience as an opportunity which leads to the expansion of cognitive processing and increased flexibility and creativity. In such an instance, Bataille and Vough (2022, p. 98) predict that “individuals who appraise identity-implicating experiences as opportunities will have greater cognitive flexibility, meaning they will be open to creative ways to approach the opportunity and engage in more divergent thinking than those facing a threat”.

2.10.3. Behavioural response to identity implicating experience

In addition to the emotional and cognitive impact of appraising an experience as either an opportunity or a threat, this appraisal also influences behavioural responses. Bataille and Vough (2022, p. 98) highlights an avoidance response to threats as opposed to an approach motivation towards opportunities: “When individuals face negative experiences, such as identity threats, they are likely to move away from rather than toward them in order to reduce uncertainty and minimise harm”.

Moreover, responses to events and experiences change over time. Brown (2015) states that in identity studies there is insufficient analysis of and use of time. “Process studies and methodologies would be particularly useful... either through longitudinal designs or retrospective interviews” (Atewologun et al., 2017, p. 289).

Depending on the appraisal of a trigger, identity work is prompted, and with different influences at play, different identity responses emerge. The identity work may or may not result in the development of certain sub-identities. Identity development is not automatic or seamless in

the phenomenon. This section explores the managers' responses in leader identity development.

What we do know is that there is a large range of identity responses. An image created by Alvesson (2010) suggests that, based on the underlying assumptions and theoretical underpinnings, the identity results differ. For example, the "strategist" crafts a functional identity based on a role transition and on an experimentation of provisional selves (Ibarra, 1999), whereas the "surfer" experiences identity as in constant flow largely influenced by social forces and interpretations (Thomas & Linstead, 2002).

Although identity responses can be crafted and deliberate to either conform to the context or to challenge the source of the threat. Either the identity is weakened or strengthened. There are a variety of responses to identity triggers, ranging from "agreement/assimilation" to "disagreement/rejection" (Beech, 2008, p. 56). Responses include forming or strengthening, compartmentalizing, concealing, integrating, revealing, and inverting various aspects of identities (Sveningsson & Alvesson, 2003).

When the trigger is perceived as a threat to identity Collinson (2003) outlines three identity strategies that individuals pursue to survive in organisations. These three strategy types are: conformist selves who adapt and accommodate to organisational demands; dramaturgical selves, who give the impression of managing acceptance; and resistant selves who employ various ruses for resistance such as irony, satire, and cynicism. Identity responses could lead to a change in identity meaning, an importance change or an identity exit (Petriglieri, 2011).

Identity responses also lead to 'stuckness' or even undoing. Individuals may experience being stuck, or "betwixt and between" identities, in a period of ill-defined identity referred to as liminality (Beech, 2011). In management development, there is a process of "identity undoing", according to Nicholson and Carroll (2013). Coherence in identity narrative is not necessarily sought nor found, and identities remain dynamic. Miscenko, Guenter and Day (2017) find that in leadership development there is an initial decline in leader identity.

In sum there are five broad strands of identity response

- Negate/ exit
- Restructure/ Weaken to conform
- Maintain/ protect/ neutral
- Maintain/ strengthen
- Restructure/ expand/ develop

Brown and Coupland (2015) find that identity threat can be appropriated to develop a desired self-identity. Knights and Clarke (2014) examine how academics react to perceived identity threats by self-defining as imposters who admit to self-doubts, as aspirants and as existentialists. In each of these cases, the people in question are not passive recipients of the threat but are active interpreters. They appraise the threat and produce different responses.

Identity work also describes how individuals negotiate among different identities, such as between the personal and social identities (Kreiner et al., 2009), or how individuals customize an identity to fit their evolving understanding of a setting (Pratt et al. as cited in DeRue et al., 2009). The appraisal process could lead to further ambiguity, insecurity, incoherence and amplify conflicts and demands between multiple sub-identities of managers. As a coping mechanism, one response may be to fragment or compartmentalise identities further. This does not bring coherence nor integration of identities and may lead to ongoing appraisal work until some resolution is achieved through experimenting with identity restructuring and partial identity protection.

Identity threat can trigger responses that lead to either problematic or to beneficial consequences. "Understanding the conditions under which this happens can help broaden the predominantly negative focus in the field as well as chart a course for an expanded and revitalised research agenda" (Petriglieri, 2011, p. 642). The experience of managers from different contexts and under different conditions warrants further attention.

An opportunity exists to further understand the responses of managers in their leader identity development. Which of the multiple triggers cue which sub-identity responses is not understood. There are dynamics at play with a manager as a leader identity requires social validation and social support to internalise, adopt and develop. The notion that others see a person as a leader does not necessarily mean that the person sees and defines himself/herself as a leader (Epitropaki et al., 2017). Internalising and enacting a leader identity involves identity work (Snow & Anderson, 1987; Sveningsson & Alvesson, 2003) aimed at resolving the intrapersonal and interpersonal incongruence between one's personal identity and the leader identity to which one aspires (Petriglieri & Stein, 2012, p. 1220).

Processes of identity construction are dynamic and evolving (Brown & Coupland, 2015) and managers are confronted by an array of experiences, both planned and unplanned. Nevertheless, it is not clear how each of these events (or triggers) are selected and appraised and acted on, by a manager in the evolution of leader identity.

Changes may occur incrementally through minor revisions (usually to the strength or integration) of one's identity, often triggered by minor events, such as claims and grants of leadership that occur within the every-day operations of businesses (DeRue & Ashford, 2010). More radical changes to a leader identity can be created in response to demanding situations or transitions, whereby individuals may revise what it means to be a leader (Ibarra et al., 2010). Identity work is active and reactive and draws on understandings of a leader identity in past, current, and future (Brown, 2015; Hammond et al., 2017).

A manager adopts various responses and tactics, which include the strengthening or weakening of the leader identity, the splintering or integrating of a leader identity within one's global self-concept (Hammond et al., 2017). There are different views within the literature on the extent to which the manager appropriates the identity threat and uses personal agency to craft a leader identity that is congruent with their preferred selves. Leaders may be motivated by a greater need for personal identification (PI) as they hold roles that represent the organisation. Ashforth, Schinoff and Rogers (2016) outline how individuals undergo identity work to enhance their personal identification (Ashforth et al., 2016). A threat focus leads to uncertainty, reduction and identity foreclosure, whereas an opportunity focus addresses the need for self-enhancement, and through identity play results in identity achievement (Ashforth et al., 2016). This is in contrast with the scholars finding that threat also leads to identity strengthening and restructuring.

Identity development is achieved despite, or even because of, the co-existence of multiple and even competing identity triggers and threats. Leader identity development is a dynamic and multifaceted process in which managers deal with aspects of themselves that seem incompatible with the desired leader identity but supposedly congruent with the self-identity (Petriglieri & Stein, 2012).

More radical changes to leader identity can be created in response to demanding situations or transitions whereby individuals may revise what it means to be a leader (Hammond et al., 2017; Ibarra et al., 2010). These changes can be better understood of how they unfold in relation to the interplay of multiple triggers and multiple identities over time.

Threats that indicate future limits on the enactment of an identity often result from the competing demands of multiple identities (Petriglieri, 2011). Future research on multiple identities should focus on deepening our understanding of the interaction between different

work-related identities. In addition, as with many other review categories, more research adopting a dynamic perspective on multiple identities is needed (Miscenko & Day, 2015).

The recursive and mutually reinforcing nature of the leader identity development process can produce positive or negative spirals (Ibarra et al., 2014). It is important that further research explores how a manager appraises identity triggers to further understand how this impacts the enactment of leader identity including the motivation, effectiveness and spiral of leadership behaviours and development. Empirical evidence on leader identity development is sparse (Middleton et al., 2019).

2.11. Locating the study and the researcher

Conducting a study within a field characterised by concept proliferation, different theoretical perspectives and approaches, and research streams requires clear clarification of the researcher's stance and positioning of the phenomenon under study within the broader context of identity studies (Atewologun et al., 2018).

Based on a review of the literature, Atewologun et al. (2018) designed a framework (see Figure 12) for researchers to locate their studies within the broader context of identity research.

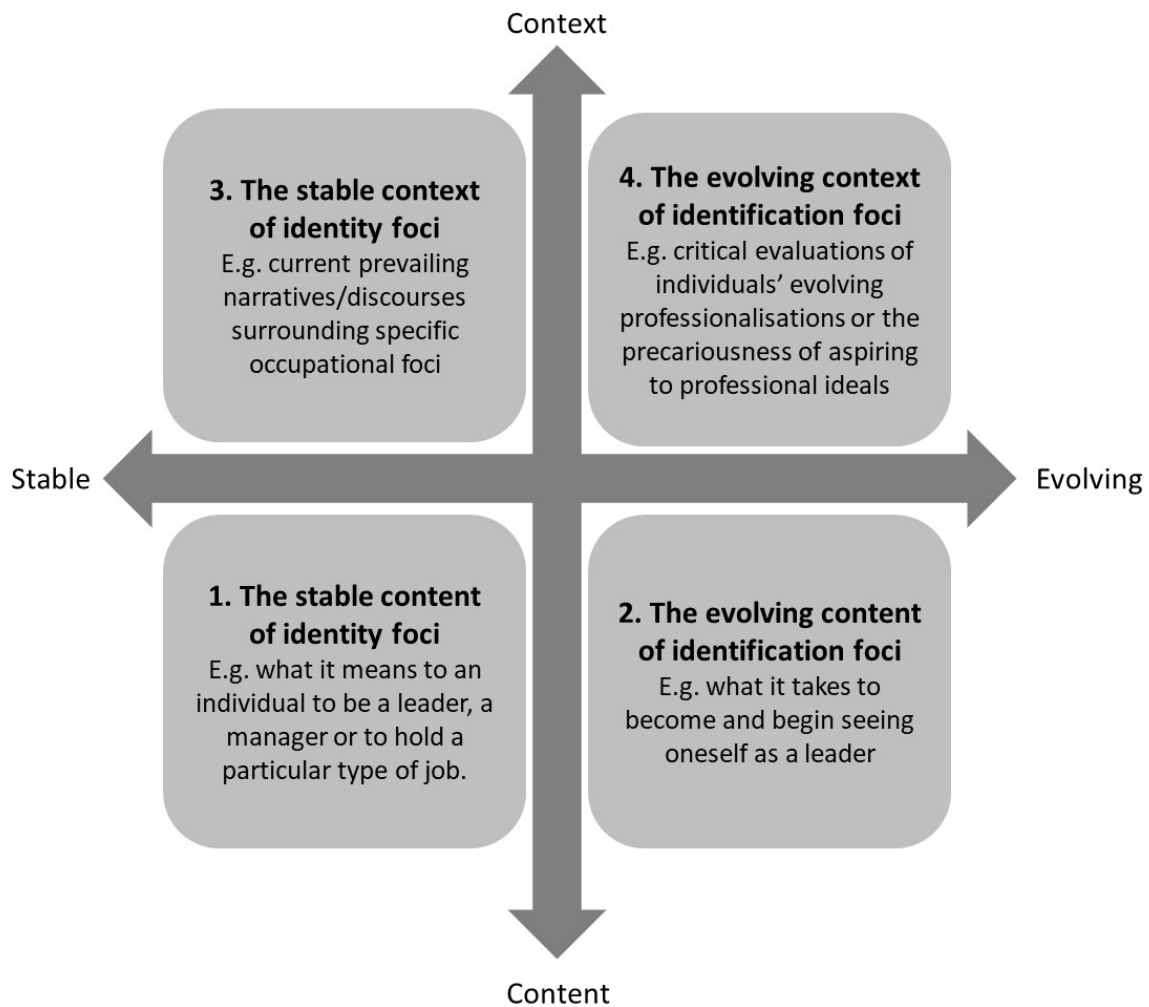


Figure 12

Locating context and content of identity

However, the framework of Atewologun et al. (2018) is only aimed at studies that focus on individual level identities and does not make provision for studies concerned with the relational or collective level of identity. As discussed in this Chapter 2 there are various debates in the literature. To ensure clarity in terms of the positioning of the researcher and this study, a positioning framework (see Figure 12) was designed in terms of these debates.

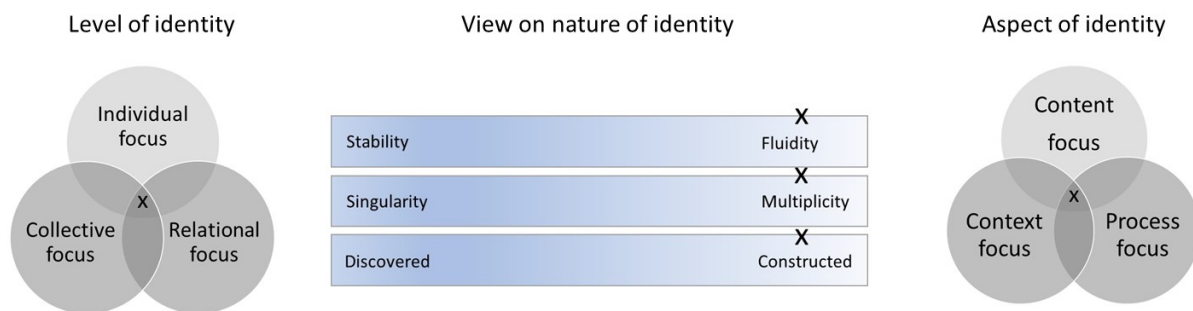


Figure 13

Researcher perspective on identity

Since this is an exploratory, qualitative study, the researcher wanted to allow for meanings to emerge without restricting participants sense-making process to a single level of identity. The objective was to allow the participants' give voice to their lived experience of their leadership journeys without predetermining or assuming which levels of identity might come to the fore.

As discussed in this Chapter 2, there are various, and often conflicting views, in the literature in terms of the nature of identity. The researcher aligns herself with a social-constructionist view of identity, which means that identity is socially constructed and negotiated, changes over time (fluidity) and consists of multiple identities (multiplicity). However, as this is an exploratory study, the researcher took cognisance of differing perspectives and remained open to consider that the nature of identity could lie on a continuum of perspectives rather than restricting reflections on the nature of identity in dichotomous terms.

Additionally, the researcher regards identity as a highly complex construct that is open to multiple interpretations across different contexts and is highly dependent on a multitude of considerations. The researcher therefore remained open to the lived experience of participants in terms of their inclusions of contextual, content and process aspects in their narrated reflections.

As individuals we evolve how we view ourselves over time as we encounter events and experiences which bring us to associate different significance and connotations with ourselves. By way of example, over our lifetimes we are a dissident teenager, a nervous and a confident student, a diligent employee, an expert professional, an ambitious manager, a good and a controlling manager, an academic, an author, a reluctant and a loyal employee, an aspiring entrepreneur, an angered citizen, an overwhelmed and engaging parent. Identity

refers to these “meanings that individuals attach reflexively to themselves” (Brown & Coupland, 2015, p. 13).

Our overarching self-identity holds these many sub-identities each with their associated meanings which change over time and over experiences. Self-identity then is the “precarious outcome of identity work comprising narratives of self” (Alvesson & Willmott, 2002, p. 627). Notably the term self-concept and self-identity are used interchangeably (van Knippenberg et al., 2004). Self-identity comprises these numerous sub-identities which are in a constant daily dynamic exchange. More than one version of self can be active at one time (Petriglieri & Stein, 2012). This view counters that of van Knippenberg et al. (2004) who emphasise that the salient identity is that which is the activated part of the self-concept. Different sub-identities come to the fore in different circumstances.

An alternate view held in identity scholarship is that sub identities form clusters within a network of self-identity and that there may be a hierarchy of salience of sub identities (Wittman, 2019). What is important is the interplay between the self-identity and the sub-identities which may be lost in the literature due to a narrowed focus on a single identity at a single point in time. Research often tends to select one identity and only focuses on that, neglecting to explore how the exchange of sub-identities within this identity influences the outcome. There is an interplay and dynamic between sub-identities over time of which the impact on the overall identity development is less known.

In addition, there are three assumptions:

- The importance of leader identity – as this influences behaviours of leaders for teams and organisations,
- The need for the appraisal of triggers to prompt identity work for leader identity development to occur,
- The need for leader development across organisations which is underpinned by leader identity development.

This underpins the desire and want of the research to undertake this study.

2.12. Gaps in the body of knowledge

As stated in the introduction to this chapter, the literature on identity is vast, heterogenous, and fragmented and some authors are critical of the growth in literature finding it fragmented

and a formidable task to try to make sense of the range of approaches and findings (Brown, 2015; Corlett et al., 2017; Sveningsson & Alvesson, 2003b). It follows that some scholars argue for greater coherence (Atewologun et al., 2017) whilst others continue to argue to retain the diversity of approaches as this contributes to richer debates (Brown, 2017, 2019).

Despite the considerable research conducted within the field of identity studies in general and, more specifically, leader identity studies, there remain various gaps in the literature. In this section these gaps will be highlighted and followed by a discussion of how this study is aimed at contributing to the existing body of knowledge.

2.12.1. Need for empirical applications to refine theory

There is widespread recognition in the identity scholarship of the need for further theory building and empirical research on identities and identity construction issues in organisational contexts (Alvesson & Willmott as cited in Brown, 2019). “Further fine-grained research is needed also to appreciate nuances in how, why and with what implications identity work is engaged in by people in organizations” (Brown, 2015, p. 31).

Bataille and Vough (2022) developed a theoretical model based on existing literature and by applying Ramarajan’s (2014) interpersonal network approach to identity work. The recent and valuable development of this literature-based theoretical model of Bataille and Vough (2022) now calls for a wide range of empirical applications and considerations that can subsequently lead to the refinement of theory. Bataille and Vough (2022, p. 110) suggest the following:

- Testing the core relationships,
- Identifying contextual and individual moderators that shape unfolding of the model,
- Investigate how changes to one identity reverberate through the network,
- Qualitatively address the above by:
 - Developing and validating scales for types of identity work, types of identity ties, and appraisal of identity opportunities and threats
 - Deployment of scales over several points in time to assess how changes in the network
- Qualitatively explore how employees draw their identity networks, including the relationships between identities at varying points in time,
- Study informants facing a similar identity-relevant trigger (e.g., organizational change or cohorts going through role transitions),

- Scholars could ascertain how informants appraise the trigger (opportunity, threat, not identity relevant) and the identity work they use as they respond to that appraisal through either qualitative or quantitative approaches,
- Future research needs to examine the impact of altering the composition of the identity network on the individual's overall perception of their network. For example, what is the overall effect of shifting from conflicting ties to compatible ties or compatible ties to synergistic ties and moving threatened identities down the salience hierarchy and desired identities further up in the salience hierarchy?
- At a more gestalt level, might individuals come to see themselves in significantly different ways as the composition of their identity network changes?

2.12.2. Need for consideration of temporal aspects

Scholars note frequently that people work on different identities at different times, but the “temporal relationships between these processes of identity work, and the trade-offs and sacrifices ... that may accompany these choices are virtually unexplored” (Brown, 2015, p. 31). There are virtually no studies that adopt a dynamic approach as to how identities develop over time in relation to one another (Miscenko & Day, 2015). There is arguably room for more fine-grained analyses of how anticipated or hoped for future selves affect current self-understandings as well as longitudinal studies of when and how future selves are incorporated into the self-concept (Caza et al., 2018).

Miscenko and Day (2015) state that the field lacks a deep foundation of research that investigates the process of identity and identification over time. They urge future researchers to consider “how work identity and identification form and develop; how do their meanings change, or perhaps, get lost?” (Miscenko & Day, 2015, p. 23).

The temporality and flow of threat responses could evolve over time, an opinion which is in line with some scholarship that views identity as undergoing periods of stability punctuated by periods of re-structuring (Ibarra & Petriglieri, 2010). “An important and potentially generative avenue for future research is to investigate the impact of time on an individual's response to identity threat” (Petriglieri, 2011, p. 657).

Following on the development of Bataille and Vough's (2022, p. 109) theoretical model, these scholars suggest the expansion of their model to “address changes in the identity network over an extended period of time”. Bataille and Vough (2022) acknowledge that the way in

which they present the processes following on appraisal as “parallel and independent” and emphasise the need to consider how these processes evolve over time. Additionally, although Bataille and Vough (2022) acknowledge that threats can be reappraised as opportunities and vice versa, they did not focus on when and how such reappraisals might take place. This is yet another area where a temporal focus can add value to the existing body of knowledge.

As discussed in this Chapter 2 there is a need for studies exploring the dynamics of leader identity development. Such explorations need to consider temporal aspects as the acceptance of the dynamic nature of leader identity would mean that the impact of identity work should be considered at different points in time.

In terms of the temporality of identity, much of the literature has focused on present and potential future identities. This is also the case in terms of Bataille and Vough’s (2022) theoretical model. There is yet little understanding of how past identities or “identities that linger from past roles” (Bataille and Vough, 2022, p. 109) might impact current identities and identity work. This is of particular importance in the context of role transitions, for example, from a non-managerial role to a managerial role or from leading self to leading others.

In terms of a future-focused temporal area of exploration Bataille and Vough (2022) specifically suggest studies that could provide a deeper understanding of instances where identity work does not lead to the enactment of a desired future identity, despite recognising an identity opportunity. This could potentially lead to the future desired identity becoming an alternative self in the current reality which Obodaru (2012, p. 37) refers to as “a self-redefining, counterfactual” description of “who the person would be in an alternative present”.

2.12.3. Need for a deeper understanding of differences in identity development

A gap exists in the literature to explain why the results in identity development differ between managers. “Why in different circumstances and at different times some people engage in identity work that leads to positive identification and become zealots for it, while others manifest dis-, schizo- or neutral identification is still largely mysterious” (Brown, 2015, p. 32). In addition, why managers fail at developing their leader identity is not clear (Alvesson & Sveningsson, 2003a).

A range of influences affect how a manager responds to identity triggers or threats. Variables which impact leadership development include beliefs, values and broader life themes (Mumford et al., 2000). An individual's learning goal orientation serves as a moderator of developmental trajectories (Day et al., 2014; Day & Sin, 2011). Future research could explore how we can see which individuals are more likely to experience growth and changes to their leader identity, and how this is so (Day & Sin, 2011; Kwok et al., 2018). For example, Bataille and Vough (2022, p. 109) suggest explorations of the “individual and situational contingencies that influence how [their] model plays out”.

2.12.4. Need for deeper inquiry into multiplicity and dynamic nature of identity

There have been extant calls for deeper inquiry into the multiplicity and dynamic nature of identity and identifications (Albert, Ashforth, & Dutton, 2000; Petriglieri & Stein, 2012).

The intrapersonal network approach developed by Ramarajan, (2014) assumes that people have multiple identities and that these identities influence their organisational behaviour. Based on a review of literature on multiple identities, Ramarajan (2014, p. 590) proposed an intrapersonal network identity approach to research to “enable [...] scholars to consider more than two identities simultaneously” and to assist scholars to “examine relationships among identities in greater detail”.

Hammond et al. (2017) state that very few studies consider two or more domains and what developmental processes take place at the intersection of different domains. Their theory considers multiple domains within a sense-making framework and they “describe how leaders first notice and subsequently interpret cross-domain connections and disconnections, leading to changes in their identity with respect to strength, integration, meaning, and level” (Hammond et al., 2017, p. 481).

Bataille and Vough (2022, p. 106) applied Ramarajan's (2014) intrapersonal network approach and contributed to an understanding of “how making changes to one identity impacts the relationships between identities”. Through this application they integrated both fluidity and multiplicity of identity and identity work in a theoretical model that reflects the complexity of identities.

Bataille and Vough (2022) acknowledge that their theoretical model is limited in terms of the representation of a wider set of identities and the authors subsequently call for a much deeper investigation into the roles different types of identities play in the identity network.

2.12.5. Need for deeper inquiry into dynamic nature of identity

Miscenko and Day (2015) state that there is a relatively large gap in the literature corresponding to the relatively small number of studies that consider work identity from a dynamic perspective. Different dynamics could lead to different identity responses at different points in time, as identity development is not linear. The overarching identity development over a period could look quite different at different points in time during this period.

“More radical changes can occur either where there is an accumulation of micro changes ...or where there is a revolutionary change in which one set of meaning giving tensions is supplanted by another. Hence, efforts to ‘manage the inside’ could either be through revolutionary rites of passage which shift a whole set of tensions or could be more subtle and gradual by altering the balances of individual tensions over time” (Beech, 2008, p. 68).

Hammond et al. (2017) specifically call for further research since “sensemaking is more interwoven than linear, it will be helpful to create a better understanding of the actual interplay among the parts” (p.494), requiring qualitative and longitudinal research to study this phenomenon. Another widely cited scholar on identity development states “whilst organizational scholars are increasingly interested in issues of identity, in-depth empirical studies analysing actual processes of identity construction and regulation continue to lag behind” (Alvesson et al., 2008, p. 24).

Although scholars (Bartel, Saavedra & Van Dyne, 2001; Riggio & Mumford, 2011) recognise the “occurrence and importance of cross-domain processes for leader development”, and their research suggest cross-domain leadership development with benefits extending across the lifespan, the process and content of what is developed has not been explored (Hammond et al. 2017, p. 481). Hammond et al. (2017) proposed a theory that considers both leader development content and process and state that, which builds theory which had traditionally focused on single leadership domain development.

Lanka et al. (2019) state that relational content and interactions which impact on leader identity construction have been underexplored in the literature as well as the process of how

individuals come to regard themselves and be regarded by others as leaders within an organisation. This process requires further exploration, particularly when changing business environments call, would for adaptive and flexible identity of managers. A manager may respond in an identity protection or an identity restructuring way to influencing factors such as developmental readiness, motivation to lead or social support for example (Epitropaki et al., 2017).

Further research has been suggested into the identity trigger appraisal and response phenomenon: "Understanding the conditions under which identity threat can trigger responses that lead to either problematic or beneficial consequences has the potential to broaden the predominant negative focus in the field as well as to chart a course for an expanded and revitalised research agenda" (Petriglieri, 2011, p. 642).

Additionally, there is a need for a better understanding of multiple triggers of various appraisals and a range of responses. Further research, with a rich picture of this phenomenon, would explore how multiple triggers of various appraisals and experiences compound into a range of responses. Identity research has primarily focused on the impact of and responses to singular identity threats (Petriglieri, 2011). However, just as individuals may experience multiple triggers at the same time, a leader confronts multiple triggers and threats simultaneously and so the process in response to multiple triggers warrants further attention. "Further research is needed to understand whether individuals employ multiple responses simultaneously, attend to threats sequentially, or combine responses into a holistic strategy for dealing with various threats" (Petriglieri, 2011, p. 655).

There is much that still needs to be done to understand in-depth the role of identity work in processes of eliciting different responses. Future research is required to investigate "how common antagonisms are in work identity narratives, how individuals broker and adapt to their competing demands" (Clarke et al., 2009, p. 347). "The more salient and crystallized a leader identity is, the higher the chances are that the individual will seek out experiences to enact and develop that aspect of the self" (Epitropaki et al., 2017, p. 120). However, a stronger identity could alternatively lead to a protective response in the face of threat (Petriglieri, 2011). This could lead to less effective enactment of leader identity.

Bataille and Vough (2022) applied an identity network-based approach that considers multiple identities to indicate the cross-identity impact of identity and interidentity work. They do however acknowledge that there is a need to "explore a wider range of identity work and interidentity work tactics: "We hope that scholars in the future will explore different tactics and

potentially the varying impact they may have on the network” (Bataille and Vough, 2022, p. 109).

2.12.6. Need for understanding of leader identity development of managers

There is considerable divergence in terms of the perspectives on “what leader identity is, where it resides, and how it functions” (Campbell et al, 2019, p. 6). Campbell et al. (2019, p. 6) state that traditional models of leader identity construction “typically oversimplify the process” and express the need for “inclusive, multi-level, interdisciplinary integration of the leader identity literature”.

More specifically, and despite rich conceptual work that recognises the key role played by leader identity, limited empirical work on leader identity development of managers currently exists (Epitropaki et al., 2017; Kwok et al., 2018). The phenomenon of leader identity development warrants further research in identity literature for managers (Beech, 2011; Campbell et al, 2019; Carroll & Levy, 2008; Day & Harrison, 2007; Ibarra, Wittman, Petriglieri, & Day, 2014; Lord & Hall, 2005; Miscenko, Guenter, & Day, 2017; Petriglieri, 2011; Watson, 2008).

Managers are often confronted by a multitude of identity implicating triggers, such as role transitions from being a subordinate to a manager, leading self to leading others as well as expanded roles and areas of responsibilities to name but a few. Due to this level of exposure of managers, in combination with the importance of leader identity in organisational context, it is critical to develop a deeper understanding of the leader identity development of managers.

2.13. Addressing the research gaps

Following on the discussion of the gaps that exist in the existing body of knowledge, it is clear that there are a multitude of research opportunities that can make a valuable contribution to the scholarship on identity, and, more specifically, leader identity development of managers.

As stated by Bataille and Vough (2022) research in this field is, by its very nature, complex and nuanced and a daunting task to take all aspects of identity and leader identity into consideration when empirical research is conducted. Rather than formulating a set of hypotheses and testing it quantitatively (and therefore, by necessity, limiting the focus to

selected aspects of leader identity) the researcher has selected an exploratory qualitative approach.

Against the background of the existing body of knowledge and specifically the theoretical models of identity development, the researcher sets out to explore the appraisal of potential leader identity triggers and the impact on managerial leader identity over time.

This study addresses the gap in the literature on leader identity development of managers by answering the research question: How do managers appraise potential leader identity triggers and what is the impact of this on their leader identity over time? The research question that guided this study is two-fold:

- How do managers appraise potential leader identity triggers?
- What is the impact of this on their leader identity over time?

In addition, this study adds to the existing body of knowledge through the consideration of the temporal aspect of the phenomenon by conducting a longitudinal study. Lastly, in terms of methodology, by following an exploratory, qualitative approach, conducting semi-structured interviews, and applying interpretative phenomenological analysis, the researcher did not limit the focus of this study to predetermined categories. The objective was to allow themes to emerge from the lived experience of manager-participants and to, retrospectively, indicate conceptual and theoretical links hermeneutically to the existing literature.

Chapter 3: Research methodology

3.1. Introduction

In the previous chapter I provided an overview of the scholarship relevant to the focus of the research study based in question based on the central research question of how managers develop their leader identity over time in response to the appraisal of potential leader identity triggers. In this chapter, I describe the research design and methodology that is followed in the study to address this research question. As stated in Chapter 1, the research question that guided this study is two-fold:

- How do managers appraise potential leader identity triggers?
- What is the impact of this on their leader identity over time?

The research objective was to gain insight into the identity development phenomenon of managers, ultimately to better understand how a manager's leader identity develops, or not. Identity development is dynamic, and the identity responses will vary over time. As such I adopted a research approach that would allow for these dynamics to be explored at an individual level over time. In sum, the research study aimed to address the primary research question on how managers appraise potential leader identity triggers and extending from that what the impact is on their leader identity over time.

To answer the research question, I applied the principles of IPA (interpretative phenomenological analysis). In this chapter I will discuss the research methodology by outlining the research paradigm as well as the methodological assumptions and principles which make this particular methodology well suited to these research questions. I then outline the strategy and research design, including the sampling and data gathering methods used. Following on from this, I then outline the data analysis process used in this study in line with the chosen methodology and design, also reinforcing the trustworthiness of the research.

3.2. Research methodology

In this section I explain my choice of a qualitative research approach and the selection of IPA (Eatough & Smith, 2017; Pietkiewicz & Smith, 2014; Smith, 1996; Smith et al., 2022; Smith & Nizza, 2021; Smith & Osborn, 2009) and in particular longitudinal interpretative phenomenological analysis (LIPA) (Farr & Nizza, 2019; Graham-Wisener et al., 2019; McCoy, 2017) as the research methodology for this study. I outline the research strategy adopted in

the longitudinal study and how I followed the IPA principles. I first outline the underpinning research paradigm.

This chapter outlines the research paradigm and research approach and methodology as covered in the table below.

Table 1

Selected research approach and methodology

Research category	Selection for the study	Notes
Research approach	Qualitative	Ontology of social constructionism and epistemology of meaning derived from interpretation
Research paradigm	Interpretive phenomenology	Following Heidegger tradition. Research paradigm of interpretivism and methodology of phenomenology
Research methodology	Interpretative Phenomenological Analysis	Smith, 1996
	Development of LIPA	Farr & Nizza, 2019

3.3. Qualitative research

Qualitative research is concerned with how the social world is interpreted, understood, experienced or produced. Qualitative research aims to produce rounded understandings on the basis of rich, contextual, and detailed data (Mason, 1996) to gain an in depth understanding of the phenomenon (Henning et al., 2004). It is not the quantum of data but the rich in-depth data derived from the participants perspective that brings the understanding on the phenomenon. Small purposively selected samples are used of participants who have experience of the phenomenon (Klenke, 2008; Patton, 2002).

I adopted a qualitative approach for the study. Qualitative research enables studying a phenomenon from the perspective and meaning of the participant. As stated by Pietkewicz and Smith (2014, p.361):

Qualitative researchers are mainly concerned with meaning (e.g., how individuals make sense of the world, how they experience events, what meaning they attribute to

phenomena). In other words, they are more preoccupied with the quality of experience, rather than causal relationships.

The qualitative research process is seldom linear in progression (Collis & Hussey, 2009; Denzin & Lincoln, 2000; Myers, 2013; Schram, 2006; Willig, 2013) but rather “an unfolding process” which “tends to be truly hermeneutical, often ‘moving in circles’ towards emerging patterns of meaning rather than conclusive facts” (Booyesen, 2017, p. 33). Broad research questions guide this process and are often adjusted throughout the unfolding research journey (Booyesen, 2017; Collis & Hussey, 2009; Denzin & Lincoln, 2000; Myers, 2013; Schram, 2006; Willig, 2013). In qualitative research the unit of analysis is rich, textual data rather than numbers and the aim is illumination of a phenomenon rather than statistical generalisations about it (Booyesen, 2017).

A phenomenon is experienced differently by different participants and the phenomena is understood through gaining a rich insight from each participants’ perspective (Collis & Hussey, 2009; Denzin & Lincoln, 2000; Myers, 2013; Pietkiewicz & Smith, 2014; Schram, 2006; Willig, 2013). Qualitative studies offer insight into how processes are experienced in a phenomenon as they can explore how the experience emerges and unfolds and even terminates differently amongst different participants. Qualitative research is well suited to a study on leaders and identity as identity development is a phenomenon which develops differently for different leaders (Epitropaki et al., 2017).

As a researcher I understand the phenomena of leadership and identity to be socially constructed and that each person interprets their own experiences and that phenomena are dynamic for each person. They develop through social interaction and personal interpretation based on personal beliefs, experiences, insights and expectations. As a researcher I am most interested in the different experiences of a phenomena and from gaining rich insight in order to better understand the phenomenon. Through this deeper understanding of a phenomenon we are better able to see how this evolves and the implications of this, in this case for leaders and leader development.

3.4. An interpretative phenomenology perspective

A research paradigm is the worldview used by a community of researchers (Fossey et al., 2002). The literature tends to refer to three broad categories of research paradigms – positivism, interpretivism and post- modern/constructivism (Bryman, 2011; Denzin & Lincoln,

2005; Klenke, 2008), each of which is characterised by its own specific ontology, epistemology and methodology. Phenomenological methodologies fall under an interpretivist paradigm.

My research paradigm follows the tradition of interpretivism which is underpinned by the ontology that realities are socially constructed and subjective contextual interpretation. The epistemology assumes that meaning and knowledge are derived through acts of interpretation. This research paradigm then requires that the role of the researcher be active to uncover the meanings of the participants experiences and perspectives. A methodology suited to interpretivism is phenomenology, which serves to understand the phenomenon in question.

Leader identity development is a phenomenon which is socially constructed and open to multiple interpretations by each participant. The perspective of the person experiencing the phenomenon is what counts. People develop subjective meanings of experience, and these are varied and multiple. The researcher looks for the complexity of views rather than narrowing the meanings into a few categories or ideas. The goal of research, then, is to rely as much as possible on the participants' views of the situation (Creswell, 2012). This study will explore the experiences of the individual participants to gain insight into the phenomenon of leader identity development.

Phenomenology, as a family of methodologies, can address a variety of topical research questions that consider subjective experiences and meanings (Finlay, 2009). The term phenomenology refers to the study of phenomena, where a phenomenon is anything that appears to someone in their conscious experience (Moran, 2000). This explicit focus on experience is at the heart of all types of phenomenological research. From Gill (2020) phenomenological explorations such as these have the potential to help us “understand the complexity of human experience and gain a deeper understanding of the meaning of participants’ experiences” (Gibson & Hanes, 2003, p. 201) in order to understand the phenomena themselves.

Phenomenology is both a philosophical movement and a family of qualitative research methodologies (Gill, 2014). The aim of phenomenological research is to capture as closely as possible the way in which a phenomenon is experienced within the context in which the experience takes place. In the phenomenological analysis, human experiences are examined through the detailed descriptions (“lived experience”) of the people being studied, in an attempt to discern the psychological essence of the phenomenon (“meaning”). This analysis seeks to reveal the meaning that comprises the phenomenon within the context of the person’s lives,

i.e. the “what we do or why we do what we do” (Clarke, 2009; Dixon-Woods, Shaw, Agarwal, & Smith, 2004; Larkin, Shaw, & Flowers, 2019; Smith, 2010).

Two variants of phenomenology have become particularly prominent: descriptive and interpretive (Finlay, 2009). The interpretive phenomenology has evolved followed the Heidegger (1988) tradition of phenomenology an accessing lived experience through interpretation. A word used to gain interpretive insight is hermeneutic which has its root in the word ‘hermes’ a Greek god who is responsible for making clear or interpreting messages between gods. This is in contrast with the Husserl (1970) tradition of descriptive phenomenology (Giorgi, 2012) which assumes an objective reality exists which can be described and considered independent of context (Lopez & Willis, 2004) to get to the essence of an experience, not an interpretation.

Hermeneutic / Interpretive Phenomenology (adapted from Lopez & Willis, 2004) is rooted in the Heidegger tradition as follows:

- The researcher looks for meanings embedded in common life practices. Meanings can be gleaned from narratives produced by participants, not always consciously known.
- The researcher uses prior knowledge to inform the framework for the interview and analysis. These are made explicit as the researcher explains how the framework was used in the interpretation of the data and in generating the findings.
- The focus is on describing the meanings of the individuals’ being in the world and how these meanings influence the choices they make. Humans have situated freedom as their experiences are linked to their social, cultural and political contexts.
- The co-constitutionality concept indicates that meanings that the researcher arrives at are a blend of the meanings articulated by both the participant and researcher within the focus of the study.
- There is no one true meaning produced by any interpretive study, but the meanings that are stated in the research findings must be logical and plausible within the study framework, and they must reflect the realities of the study participants.

One research methodology which has been evolved out of this tradition is interpretative phenomenological analysis (IPA). Jonathan Smith’s IPA is a recent type of phenomenology

(Smith, 1996) that emphasizes interpretation in line with Heidegger and has recently been developed further by Smith, Flowers and Larkin (2022) and Smith and Nizza (2021). IPA is equally indebted to Heidegger and his view that “the very term “description” already implies that what is described has been phenomenally encountered and interpreted “as” something.” (Eatough & Smith, 2017). IPA has become increasingly used across the social sciences, yielding hundreds of studies (Smith, 2010; Smith et al., 2022; Smith & Nizza, 2021).

My study was based on an interpretive phenomenological approach as it sought to understand the lived experience of managers in leader identity development and meanings associated with leader identity over time. The next section outlines the IPA methodology and principles and highlights how IPA was selected as a well-suited methodology to the research questions in this study.

3.4.1. Interpretative Phenomenological Analysis (IPA)

IPA was developed by Jonathan Smith in 1996 (Smith, 1996, 2010) as a research design founded in the interpretive phenomenological stance of Heidegger. The central focus of IPA is a “detailed examination of personal lived experience” (Smith, 2011, p. 9) of a certain phenomenon experienced by individuals (Smith, 2007, 2011; Smith & Osborn, 2009). The aim of IPA is to explore in detail how participants are making sense of their personal and social world, and the main currency for an IPA study is the meanings particular experiences, events and states hold for participants. (Smith, 2019; Smith & Osborn, 2009). The findings of IPA investigations are focused on providing deep insight as connected to extant theory, which facilitates the readers’ capacity to re-envision how they might see the phenomenon in question (Kirn et al., 2019).

Gill (2020) provides an overview of guidelines for selecting a methodology comparing IPA over descriptive phenomenology and grounded theory. This comparison highlights how IPA was well suited to this study:

- Research aim – the aim of this research has been to understand the lived experience of participants and their understanding of the phenomenon and hence IPA is a good fit.
- Sampling – phenomenology typically requires small samples without any point of saturation, even a sample of one and saturation is not required.

- Key analytical steps – Phenomenology constantly check interpretations with available data. IPA's idiographic focus, such that it seeks to understand individuals' contextualized experiences.
- IPA as a methodology addresses the research aim and the research design aligns with the principles and assumptions of IPA, as outlined below.

3.4.2. Interpretative Phenomenological Analysis (IPA) assumptions

IPA has three primary theoretical underpinnings: phenomenology, interpretive and idiographic. The principle that IPA is grounded in interpretive phenomenology has been covered extensively above, in that it explores a phenomenon through the lens and meaning of the participant. IPA recognises that this is an interpretative endeavour because humans are sense-making organisms. In IPA, therefore, the researcher is trying to make sense of the participant trying to make sense of what is happening to them.

IPA is idiographic in its commitment to examining the detailed experience of each case in turn, prior to the move to more general claims (Smith, 2010; Smith & Osborn, 2009, 2015). IPA studies are usually conducted with small numbers of participants (e.g. five to fifteen) because the aim is to present an intimate portrayal of individual experience.

Inherent to this model is the notion of a person as intrinsically a self- reflexive, sense-making agent who is interpreting his or her engagement with the world IPA has a “distinctive idiographic, micro-textural focus ...to capture something of the cognition involved in making sense of experience” (Smith, 2019, p. 180).

IPA is underpinned by a hermeneutic process by engaging in a dynamic process of exploring the phenomenon as lived by individuals while also recognizing the broader significance of this phenomenon in relation to extant theory (Smith & Osborn, 2009) IPA is committed to doing justice to existing theoretical concepts by articulating and challenging them through the lived worlds of individuals.

In fact, IPA follows a double hermeneutic enquiry. The participants are trying to make sense of their world; and the researcher is trying to make sense of the participants trying to make sense of their world (Eatough & Smith, 2017; Smith, 2004). The researcher perspectives therefore are key to interpret the data (Smith & Osborn, 2009; Willig, 2008) While IPA is committed to the value of attempting to understand the world from the perspective of an

individual, it also recognizes that this cannot be done without interpretative work by the researcher.

The researcher brings a pre-understanding into the research, and this is actively used, qualified, challenged and developed in the research process (Alvesson & Skoldberg, 2000). The researcher tries to go beyond the 'surface' to look for something less obvious, or less easily revealed in a (quick) coding process, and where, also, the text as a totality is borne carefully in mind, which means that variation and contradiction are taken seriously. Meanings expressed in different parts (passages in interviews) are interpreted in depth, but also related to the interview as a whole (Alvesson & Sveningsson, 2003a, p. 967). As the researcher I bring in my insight, experiences and background in relation to the research subject, and had kept these in my data analysis notes and research journal, as suggested in qualitative research literature (Larkin et al., 2019; Smith & Osborn, 2009).

This reflexive practice of the researchers is essential to the robust research process of IPA as the researchers can recognise, celebrate, and use their own potential bias to inform novel interpretations (Goldspink & Engward, 2019).

IPA researchers acknowledge the inevitability of biases, preoccupations and assumptions when conducting research; they reflect on how these shape their research inquiries and they aim to engage with them fruitfully for the purpose of understanding. (Eatough & Smith, 2017) There is an iterative movement back and forth between theory and data, between pre-conceptions and openness to surprise (Tomkins & Eatough, 2014).

Whilst I remained faithful to the original participants' expressions through the use of verbatim extracts, I use my critical appraisal to prompt insights and alternative explanations. By being upfront with my perspectives this supports the integrity and transparency of the research as my researcher biases are not inadvertently swaying my interpretation but are intentionally guiding my novel inquiry (Brocki & Wearden, 2006). Through observing the data from the viewpoint of the participant and my viewpoint as the researcher is that the double hermeneutic is evident and transparent (Smith & Osborn, 2009).

In sum, IPA is both phenomenological and inductive, by rooting the findings in participants' lived experience of a given phenomenon. It is interpretative, in using a double hermeneutic, or "two-stage interpretation process whereby the researcher attempts to interpret how the participants make sense of their experience" (Pringle et al., 2011, p. 20).

3.4.3. Use of IPA in management and identity studies

Smith's (1996) Interpretative Phenomenological Analysis (IPA) was initially developed for research in the field of psychology and has become increasingly popular in the field producing hundreds of studies (Smith, 2011).

IPA is one of the best-established qualitative approaches in UK psychology extending beyond its initial reach in health and clinical and counselling psychology to psychology researchers throughout the world. Increasingly the research methodology has been applied across fields concerned with the lived experiences and interpretations of a phenomenon. IPA's use has extended into organizational studies (Smith, 2019; Tomkins & Eatough, 2014), education (Denovan & Macaskill, 2013), health (Cassidy et al., 2011; Seamark et al., 2004), sports science (Callary et al., 2015) and the humanities such as in professional dancers (Hefferon & Ollis, 2006). IPA studies are also emerging in the executive coaching field (Bennett et al., 2016; Booysen, 2017; Buckle, 2012; Hindmarch, 2008).

A growing number of management scholars have utilised IPA to yield new insights (Cope, 2011; Fitzgerald & Howe-Walsh, 2009; Murtagh, Lopes, & Lyons, 2011; Rehman & Roomi, 2012) For instance, Murtagh et al.'s (2011) IPA study sought to understand the experience of voluntarily career changes for women. Their study purposively recruited eight women with relevant experiences and utilised semi-structured interviews to interview the participants multiple times. Rich accounts of how each participant made sense of their decisions revealed how they initially took steps that they did not intend to use to make change careers but that they later viewed as pivotal. Murtagh et al.'s (2011) study highlighted the emotional drivers of career decisions and provided empirical evidence for the other-than-rational decision-making.

IPA comes into its own when examining people's perceptions of major experiences happening to them and which engage "hot cognition" (Smith, 2019, p. 167) around a discrete or ongoing event that matters in a person's life experienced as a burning, emotive and dilemmatic event (Eatough & Smith, 2017). The event "engenders much cerebral activity, and that cognition is emotionally laden" (Smith, 2019, p. 67).

Identity often emerges in the analysis of IPA (Smith, 2004, 2011a; Smith & Osborn, 2009) as IPA deals with issues that matter to people and that in some way, change or influence how people think about themselves and their place in the world. IPA is a particularly useful methodology for examining topics which are complex, ambiguous and emotionally laden (Smith & Osborn, 2015). A core concern of IPA is to consider "what is the experiential significance of what is unfolding?" Additionally, to consider the experiential significance of an

event in an IPA study often evolves into a concern with the significance for the person's identity (Smith, 2019, p. 168). IPA is well suited to research on identity, and in this study, leader identity development.

According to Gill (2014), who studies elite identity, he states that given its epistemological assumptions, IPA is suitable for studying experiential accounts and therefore for examining individuals' identity constructions and their involvement in their context (Smith & Osborn, 2009). Gill (2015) showed how the continual promotion of identity work to build and maintain an elite identity, within a consulting firm, leaves many of the consultants feeling acutely anxious about their status. This study highlights how interpretive types of phenomenology can be applied to the subject of identity to understand how individuals experience and make sense of their identity constructions, without seeking to generalize beyond a small population (Gill, 2020).

By way of another example Tomkins and Eatough (2014) study the identity work of 'work carers' using IPA as the method of data analysis, which they find allows them to reflect the complexity, ambivalence and inconsistency of identity. Smith (1999) too writes on identity development in the transition to motherhood.

The suitability and studies in identity development contributed to my selection of IPA for this study. It was important to me to use a research design that could uncover the dynamics and complexities of the phenomenon.

Gill (2020) compares and contrasts phenomenology and grounded theory as two popular methodological approaches to the study of identity work. A range of methodologies have been used to study identity work such as ethnographic (Thornborrow & Brown, 2009; Watson, 2008), historical (Anteby & Molnar, 2012), narrative (Brown, 2006; Humphreys & Brown, 2002) and grounded theory (Corley et al., 2006; Kreiner et al., 2006b) methodologies. By contrast, phenomenology is a relatively rare methodology in the field of management research (Gill, 2015; Holt & Sandberg, 2011).

This section addresses how phenomenology is a good fit to address these research questions in this study. The aim of this study is not to explore one context in depth, but to be able to compare and contrast the current lived experience of managers, and as is outlined later the narrative and discourse analysis would not necessarily provide the interpretation required around the experiences of the phenomenon. Also this research does not have as its primary aim to build theory (Gill, 2020), as grounded theory may do. In its findings IPA contributes to

the research agenda and contributes to the theoretical frameworks around the phenomenon, as theoretical transferability applies.

IPA differs from narrative analysis which focuses on the story of an individual's entire life, or their life history. Narrative inquiry tends to view meaning as originating in words and "takes as its object of investigation the story itself" (Riessman, 2002, p. 218). In contrast, phenomenological researchers use verbal data to access individuals' lived experiences. In this way, phenomenological approaches are appropriate to address research questions that view an experience as the main object of investigation and not the story of an experience. IPA too has very different theoretical commitments from discourse analysis.

Discourse analysis is interested in how verbal accounts given in conversations, interviews and written documents are linguistically constructed, and the social tasks people are trying to perform when they use particular verbal expressions. Discourse analysis as understood by most current social psychologists is sceptical about looking beyond what people are saying in order to inquire into how they are thinking or feeling about a particular topic. The research choice in this study is deliberate and this does not render other approaches inappropriate, but I do declare the research approach adopted and ensure consistency in approach to support the trustworthiness of the findings.

3.4.4. Longitudinal Interpretative Phenomenological Analysis (LIPA)

Identity development occurs over a period of time, and I was concerned to research the phenomenon over time in order to be able to address the research questions. Qualitative longitudinal designs add a temporal dimension by gathering data at multiple time points (Farr & Nizza, 2019) The longitudinal variation of IPA has been termed Longitudinal IPA (LIPA) which adds the dimensions of timing and frequency into the research design. IPA remains the overarching methodology with the longitudinal design considerations built into the data gathering and data analysis. I selected this version of IPA to allow for the participants to be exposed to a range of events which may have triggered their identity development.

The design of LIPA is constructed around the timing and frequency of data collection around the experiences related to the phenomenon in question. The researcher collects data at particular points in time if the experiences relate to particular times. Or the researcher collects data over a period or at a certain frequency estimated to maximise the experiences related to the phenomenon. The gathering and analysis of collected data is also designed to be achievable within the allocated study time (Farr & Nizza, 2019). These design decisions on

timing and frequency of data collection revolve around the research question and type of experiential change driven by the phenomenon.

The challenge for LIPA researchers is to devise methods that access the shifting concerns of participants at each time point and elicit sufficiently rich data (Farr & Nizza, 2019). Timing and frequency of data collection and the type of data gathered reflect the temporal focus of the study and influence the type of experiential change captured. Given the volume of data collected in longitudinal studies, it is a priority to select data gathering methods that can help realise that desired focus and study rationale (Farr & Nizza, 2019).

This research study calls for data to be collected at a certain frequency over a period of time, and not necessarily around a particular event or timing. This study was exploring how triggers prompt leadership identity development and hence the participants needed a period of time to be exposed to various perceived identity triggers and to explore how these may have impacted leader identity development. The research strategy I adopted is outlined below in this chapter.

3.5. Research strategy

My research strategy was to study the phenomenon of leader identity development as experienced by a sample of managers over a period of time. I adopted the research methodology of interpretative phenomenological analysis (IPA) (Gill, 2015; Smith & Osborn, 2009) in a longitudinal study using the principles of longitudinal interpretative phenomenological analysis (LIPA) (Farr & Nizza, 2019). The methodology was primarily informed by the IPA guidelines developed by Smith and other scholars (Gill, 2014, 2015, 2020; Pietkiewicz & Smith, 2012; Smith, 2007, 2011; Smith et al., 2022; Smith & Nizza, 2021; Smith & Osborn, 2009), which are not prescriptive, and researchers are encouraged to adapt them within the IPA paradigm (Willig, 2008).

I selected a sample of participants who were employed in management roles. These managers were also selected from a pool of participants who would be exposed to leader identity development triggers over time and have the opportunity to experience the phenomenon of leader identity development. Individuals were the primary unit of analysis in line with the idiographic principles of IPA. The idiographic focus required a small sample and a final number of four participants was included in the data analysis. Data was gathered from one-on-one semi-structured interviews with this sample of participants.

I chose time points over this period of time to collect data through interviews. The longitudinal design included three time points and three rounds of interviews with each participant. For the purposes of this study four managers were interviewed three times each over an eight-month period from April 2019 to end November 2019.

It is important to note that LIPA requires an explanation of the time point and time period of the study. Regarding the variable of time, “There is no clear definition of the meaning of ‘long’ in longitudinal research” (Corden & Millar, 2007, p. 586). However, the minimum standard is two or more measurements.

Each interview for each of the participants was conducted eight weeks apart. An eight-week gap has been cited as constituting a longitudinal study (Miscenko et al., 2017).

This also allowed for time for the participant to experience a range of identity triggers in between each interview, whilst not being too long for the experiences of that period to be forgotten.

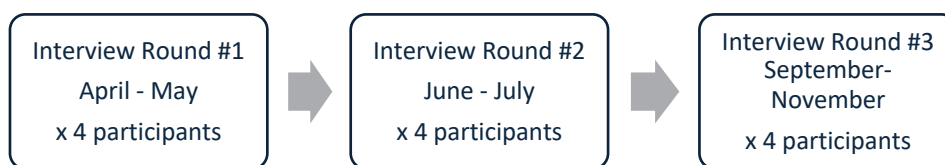


Figure 14

Three rounds of interviews per participant

I conducted a preliminary literature review to understand the phenomenon and design the interview guide, and to inform the data analysis to detect anomalies, differences and nuances in the data. For the purposes of this study twelve interviews were conducted and transcribed, coded and analysed. IPA follows the idiographic principals and an in-depth analysis of single cases, across time points, was conducted prior to analysing the subsequent cases (Pietkiewicz & Smith, 2012; Smith, 2007, 2011b; Smith et al., 2022; Smith & Nizza, 2021; Smith & Osborn, 2015).

The data analysis occurred for each individual separately over the full time period, as well as at each time point in round #1, round #2 and round #3. A cross-case analysis was also conducted (Bryman & Bell, 2003) at each time point and for the overall time period. The cross-case analysis identified patterns of similarity and instances of variance across the individuals within each sample (Eatough & Smith, 2017; Pietkiewicz & Smith, 2012, 2014; Smith, 2000;

Smith et al., 2022; Smith & Nizza, 2021; Smith & Osborn, 2009). In this analysis I focused on themes spanning time, rather than at specific time points (Farr & Nizza, 2019) to gain insight into the research questions.

The Figure 15 below to show the rounds of analysis per case and cross case.

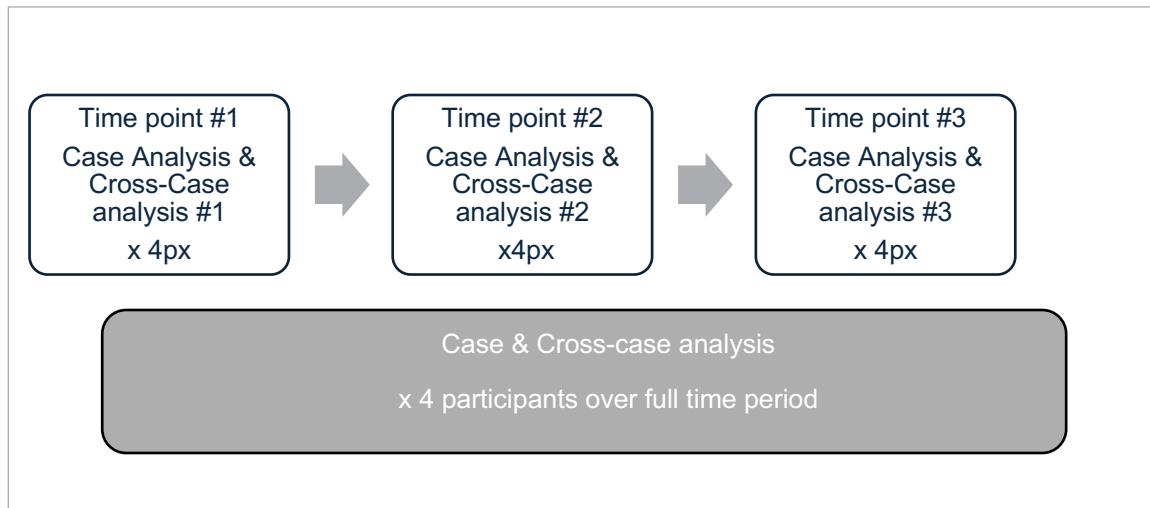


Figure 15

Rounds of case and cross case analysis

The study involved multiple snapshots of experience which indicated patterns of meaning across time allowing an exploration of a deeper insight into the lived experience of participants of the phenomenon over time (Eatough & Smith, 2017). The literature review extended into the analysis stage of each phase as I needed to further interpret the findings that were generated inductively from the interview data (Pietkiewicz & Smith, 2012; Smith, 2007, 2011a; Smith et al., 2022; Smith & Nizza, 2021; Smith & Osborn, 2009).

3.6. Sampling of participants

This section provides an overview of how the sample for this research study was selected.

3.6.1 IPA sampling principles

IPA utilises three principles in its sampling strategy: smaller sample size, purposive sampling and homogenous samples. I followed the research design principles of IPA and selected a sample (Pietkiewicz & Smith, 2012; Smith et al., 2022; Smith & Nizza, 2021; Smith & Osborn, 2009) of between three and eight participants (Pietkiewicz & Smith, 2012).

IPA does not seek theoretical saturation and utilises a smaller sample size usually towards the lower end of 1 to 30 (Brocki & Wearden, 2006) as per phenomenological studies (Starks & Trinidad, 2007). The focus is on thick descriptions to ensure that the contextual richness of the phenomenon under study is conveyed (Mertens & Wilson, 2012). This allows sufficient in-depth engagement with each individual case but also allows a detailed examination of similarity and difference, convergence and divergence. The emphasis is on having sufficiently rich data as opposed to sufficient numbers of participants.

The sampling of participants is purposive in IPA. Purposive sampling is a form of non-probability sampling (Babbie & Mouton, 2010; Collis & Hussey, 2009; Strydom, 2021) in which the researcher selects a sample which will be able to provide the thick, rich description required on the phenomenon being studied (Mertens & Wilson, 2012). The intention is to recruit participants who can offer a meaningful perspective of the phenomenon of interest. The researchers recruit participants who have exposure to a certain lived experience. The researcher asks in the selection: do you have the experience I am looking for? (Englander, 2012).

Larkin and Thomson (2012) suggest that the topic should be something that *matters* to the participants, and participants are selected precisely because they can offer a valuable perspective on the topic at hand. Typically, this understanding is experiential (Larkin & Thompson, 2012, p. 103). This means that samples in IPA are usually homogeneous; comprising participants who have an experiential understanding of the phenomenon under study (Larkin & Thompson, 2012; Pietkiewicz & Smith, 2012; Smith & Nizza, 2021; Smith & Osborn, 2009, 2015).

In IPA, homogeneity of the participants in a sample is mainly in relation to sharing the experience of the phenomenon being studied (Brocki & Wearden, 2006; Willig, 2008). Smith and Osborn (2009) emphasise that IPA researchers need to be pragmatic in choosing participants, in order to find participants with the experience of the phenomenon under investigation and where there are issues of accessibility. Convenience sampling therefore tends to be linked to purposeful sampling (Smith & Osborn, 2009).

3.6.2. Selection of the pool of participants

The study focuses on the lived experience of leader identity development and in particular those exposed to leader identity triggers. Following IPA principles a small sample was selected

to allow for in-depth engagement with each individual case and to allow for a detailed exploration of similarity and differences between cases (Smith & Osborn, 2009). I used purposive sampling to glean a homogenous sample, with experience of the phenomenon as a primary basis for sampling. I considered three criteria in the selection of the pool of participants: exposure to the leader identity phenomenon, managers employed in organisations, exposure to leader identity triggers such as on a management development programme at a business school as an identity worksite (Kets de Vries & Korotov, 2007; Petriglieri & Petriglieri, 2010).

The pool of participants needed to be drawn from those who would be exposed to potential leader identity triggers and over a period of time to discern how this impacted leader identity development. In contemporary business life, in particular, social contexts are frequently portrayed as unstable, ambiguous and sometimes contradictory (Alvesson & Willmott, 2002; Watson, 2008). Even though turbulence and instability may sometimes be exaggerated, in many organisational and life situations, the elements of change, contradiction and fragmentations are salient and create reactions such as curiosity, anxiety and search for ways of actively dealing with identity (Sveningsson & Alvesson, 2003). This meant that managers employed in organisations would be engaged in forms of identity work. The course of daily organisational experiences would proffer potential identity triggers and multiple triggers over a period of time.

Organizations typically serve as identity workspaces for their members (Alvesson & Willmott, 2002). Organizational socialization shapes people's identities (Petriglieri et al., 2019). The pool of participants would be drawn from a sample of managers employed in organisations. The primary research question is around how managers leader identity responds to potential identity triggers over time. Leader identity develops over time in response to various identity triggers and the trajectories are different. The study explores the influences on the identity development in response to triggers (Middleton et al., 2019).

As outlined in the literature review in a previous chapter, participants on a leadership development programme would be exposed to identity triggers and be in an 'identity workspace' (Ibarra & Petriglieri, 2010; Kets de Vries & Korotov, 2006; Petriglieri & Petriglieri, 2010). Previous research has demonstrated that identity work occurs on management development programmes (Day et al., 2014; Ibarra & Petriglieri, 2010; Lord & Hall, 2005). The study does not examine a manager's development nor does it examine a management development programme.

The management development programme offers exposure to leader identity triggers, which is the focus of this study. So I drew from a pool of participants registered on a management development programme which provided potential sources of identity triggers and identity work (Day & Harrison, 2007; Miscenko et al., 2017). This provides one level of homogeneity in the phenomenon of leader identity development triggers as the participants would have been exposed to similar potential identity triggers on the programme. This does not negate the multitude of other identity triggers but for this study provides a base of exposure to the phenomenon in question. The study could be assured that there would be sources of leader identity triggers and the experiences of the managers of the phenomenon in question could be studied.

The pool of participants was drawn, and in sum to get to:

- A final sample of four participants employed as managers in organisations from the same sector to support homogeneity.
- Participants enrolled in a management development programme at a business school which increased exposure to identity triggers over a period of up to ten months.

This sample of participants would then be able to provide insights into the research question of this study: How do managers appraise potential leader identity triggers and what is the impact of this on their leader identity over time?

It must be noted that the management development programme was not under review in any way, nor was the content or process of the programme in consideration. The programme offered a source of participants who would be exposed to identity triggers and who are employed as managers in organisations.

I used a process to screen and select the sample and the details of the final selection of participants is outlined below.

3.7. Pilot interviews to test sample source and interview guide

I am a professional associate with the business school in question and lecture and coach on a management development programme at the school. I chose to conduct two pilot interviews with participants who had completed this a different programme. Some potential risks emerged which I mitigated. I explain below how the pilot interviews led to key research design changes and to the evolution of the interview guides.

I conducted two pilot interviews ahead of the study to check the interview schedule and to gauge whether the questions draw sufficient insight into the phenomenon being studied. I adjusted the interview schedule accordingly but other changes were required to the research design as well.

I had facilitated a different management development programme at the business school in October 2018, with the follow up day in November of that year. I had invited this cohort to participate in interviews and obtained a list of willing participants. It is from this pool that I contacted a sample for the pilot interviews. I sent an email requesting the interviews and followed up with those that responded and were available to participate in the pilot interviews.

On February 21st, 2019, I conducted two pilot interviews ahead of the study. The interviews were held face to face in a syndicate room at the business school. I recorded both interviews and transcribed them. There were many findings from these interviews which were invaluable in highlighting areas of change for the research design.

Some parts of the data gathering were confirmed:

- In the pilot interviews I was able to establish a rapport and willingness to share by the participants.
- The timing worked for the flow and number of questions in the interview schedule.
- It was seen to be important to keep the interview schedule consistent between participants to ensure the range of the phenomenon was explored, so as not to have completely different questions for each participant, even though the methodology allows for this.
- To this end the interview was timed to last 45 minutes and this was found to deliver some key insights from the participants.

In the study each participant would be interviewed in the study three times. The initial interview was designed to unpack how the participants see their leadership identity. In the pilot interview this took the full set of questions to uncover. More time and follow up interviews would be needed to explore the phenomenon further. What was important to this study was to uncover the identity responses to a range of events and experiences for each participant. The pilot study confirmed that two follow up interviews were necessary to uncover these experiences and that these are key to probe the experiences further and gain deeper insight into the phenomenon of leader identity development over time.

The upfront pilot interviews also revealed that the participants did tend to recall one event and chose (perhaps subconsciously) an event or experience which paints themselves in a positive way as a leader. This may be partly due to a tendency to want to paint a coherent and positive picture of our identity.

Different ways were required to prompt recollection around a range of experiences, and not to only rely on the recency effect or on those experiences that are highly emotive for the participant. There may also be experiences which are deemed as 'negative' or which may reflect negatively on the participants leadership. The participants erred towards wanting to share a coherent narrative of their identity. Interestingly one participant drew on embedded values which she deems as important, highlighting how these have come to the fore again in her new leadership role. The other participant cited new behaviours which are impacting how she sees herself as a leader now. For the pilot this finding boded well for the opportunity to glean rich data, insights and experiences from the final participants.

The following questions remained with me, however:

1. Is there respondent bias? The participants seemed to want to present a positive image to me, perhaps linked to me being the facilitator of the programme that they attended in the previous year.
2. How to be sure to distinguish in the questions and the data analysis an event/experience which may or may not be an identity trigger for the participant. This would be key to the interview probing and the data analysis.

These were the three main areas of change I made to the research design as a result of the pilot interviews:

1. Addressing respondent bias
2. Interview schedule adjustments

1. *Respondent Bias - particularly social desirability bias*

As the researcher I did not refer once to the management development programme that I facilitated in the interview and yet the interviewees made constant reference to this throughout the interview. In the pilot the participants alluded to me as the facilitator and it appeared were seeking positive reinforcement by sharing perceived positive identity shifts. The interviewees seemingly wanted to paint a positive picture for me of what they had achieved since participating in the programme of 2018. I was the facilitator of the programme and this did potentially bias the respondents.

As a part of my profession I am a change programme designer, a lecturer, facilitator and coach on leadership development programmes. The focus of my research was focused on the participants and not on the programme. I was concerned that if I was involved in the programme I may be too aware of the design and process and the intended triggers and may unintentionally prompt the participants to respond around my perceived cues or triggers. Also it emerged in my pilot interviews, as outlined above, that when I was the facilitator on the programme that the participants were drawn from, that this potentially biased the responses.

I therefore chose in my design to draw a sample of participants from an alternate programme that I played no part in, either as a lecturer or a programme developer. By selecting a programme that I was not involved in, these potential respondent biases could be minimised. This was not seeking to dismiss the influence of my experience and perceptions on the research. IPA acknowledges the contribution that this makes in the research analysis and it seeks to include the researchers' insights in the double hermeneutic loop.

My experiences in management development and leader identity development provided filters to interpret the data and by me being transparent around these and interrogating the data I could gain novel insights. But the choice of programme to select the participants from was important to limit social desirability bias by participants.

As a result of the findings from the upfront pilot interviews I changed the sample programme to draw a pool of participants from a different programme, a general management development programme at the same business school. For the sake of this research I shall refer to this fictionalised title of the programme as the MDP. The MDP meets the study criteria of sourcing senior managers who are participating in a programme over time which allows for a longitudinal study. The timelines shifted in the research plan as this programme started in April 2019 and I adjusted the schedule accordingly.

(v) Interview schedule adjustments

I adjusted the interview schedule following the upfront pilot interviews. I shortened the initial interview schedule given the confirmation of two additional interviews in the research design and the interview was timed to last 45 minutes. The pilot interview participants tended to focus on one or two events only around their leadership behaviours. The participants also tended to focus on responses which painted them in a positive light. I revised the questions in the interview schedule to ask upfront that the participants consider a range of events, experiences or triggers, and to consider those that are perceived to be positive and negative. I added a step and I did send a mobile phone message or email ahead of the second interview asking

the participants to list all the recent experiences or events that had triggered them to think about their leadership. In this way participants would consider a range of triggers and include those considered both positive and negative experiences.

The upfront pilot interviews hence led to the change in the sourcing of the participants to a different programme and the research strategy and interview schedule were adjusted. The MDP met these criteria. Following these findings of the pilot interviews in February, I approached the programme director for permission to access the MDP participants. This was granted and I gave a 10-minute introduction to the class in their first block on April 10th, 2019.

3.8. Criteria for selecting participants

The criteria for the participants were as follows to meet the criteria for this study of leadership appraisal of identity triggers:

- Hold a management position in an organisation.
- Self-identify as a leader (self-report in application to the programme).
- Participate in the full duration of the management development programme.
- Willingness to sign consent to participate in the research.
- Awareness of own leadership development and able to articulate insights.

The MDP programme is an open enrolment programme, meaning that participants attended from a range of companies and sectors. Many participants self-selected to participate in the programme and were company sponsored, and many requested to attend due to their management development pathway. Applications come through to the business school who conducted an initial screening to see if the participants met the criteria of the programme, one of which is that the participants already hold a position of senior management by which we mean they have managers reporting to them. This supported gaining access to a homogenous sample of participants.

3.8.1. Process of selecting of the participants

The MDP class list included 65 registered participants. In the ten-minute slot in April 2019, I shared three slides on the nature of the study stating it would involve participating in three interviews over the period of eight months. I made a commitment to maintain anonymous participation. I handed out a letter inviting participation and explaining the process of three interviews and assuring that the participants can exit the process at any stage. I handed out

sheets with the first name of participants printed on them, asking the person to tick 'yes' next to their name if they were willing to participate. I handed out 30 sheets, so that each row in the auditorium had at least three. This was to facilitate a speedy process and since there were so many forms you could not see who had ticked and therefore could prevent participants feeling any peer pressure to tick their names. (See Appendix A: Invitation letter)

These steps were followed to select the participants:

1. I collated the full list of 'yes ticks' indicating willingness to be interviewed for this study. Out of the full number of MDP class participants, '42' indicated 'yes' and were willing to participate. This was higher than I anticipated or needed, as my aim and research design was to start with ten participants, to end with between six and four.
2. Initial screening. I reviewed the list of 42 potential participants to work towards a smaller homogenous sample. Two factors emerged as a basis for an initial screening. The first was to keep to participants working in the same industry and nineteen of the responses were from managers working in financial services firms. I subsequently followed up with the remaining list and thanked those who had volunteered explaining that I would not be pursuing their offer to volunteer.
3. Nineteen participants remained on the list from the initial screening and I followed up with an email to set up a call. One person asked to leave the study due to work pressure, and another had incorrect contact details. This first email letter spelt out the time required for the study and the benefits to the individual for participating in the study as well as assuring the person of the anonymity of the process and the opt-out clause which can be enacted at any time during the study.
4. From the initial email correspondence seventeen remained on the potential sample list. I was able to set up interviews with thirteen potential participants between 26 April and 29 May. From this list one person left the programme due to leaving the employer at the time and two people did not respond to confirmation emails and were as a result, omitted from the sample.
5. The potential sample list then contained ten potential participants. I used two participants who were from related industries as a second round of pilot interviews, and one potential participant did not respond to the request to set up the second interview. I confirmed the design and interview schedule from this round.
6. Seven participants remained in the sample list that I conducted the first round of interviews with. The research design assumed that participants may drop from the study and would end with the analysis of between six and four participants and so I kept these seven on the list.

7. I interviewed seven participants in the round of interview #1, seven in round interview #2, and six in the interview #3. One participant rescheduled the interview due to work pressure and it slipped out of the time frame of the study.
8. The semi-final list of participants then included six participants. One participant was not able to indicate insight nor reflection around leadership identity over the period. One participant holds a different nationality from the other participants thus limiting homogeneity in the sample. I hence elected to analyse the data from four participants.
9. The final number of participants stood at four. I analysed four participants interviews over three interviews each. I hence refer to a sample of four participants and a series of twelve interviews for the purposes of this study.

Table 2

Final sample profile

Code	Gender	Birth year	Employed	Sector
1 Kay	Female	1974	Senior Manager	Banking
2 Paul	Male	1982	Senior Manager	Insurance
3 Wendy	Female	1969	Senior Manager	Insurance
4 Dion	Male	1974	Senior Manager	Insurance

I committed to keep the participants names confidential and have used the pseudonyms above to refer to the participants instead of using their given names. All participants identified separately as binary as he or she, and as such I identify them as him or her in their respective sections. The use of the terms does not denote any exclusion of any transgender or non-binary identification.

3.9. Design of the interview guides

The primary concern of IPA researchers is to elicit rich, detailed, and first-person accounts of experiences and phenomena under investigation. I used semi-structured, in-depth, one-on-one interviews to gather data.

I developed an interview guide for each of the three interviews (Smith & Osborn, 2009) which provided the opportunity for the participants to explore their lived experience (Eatough & Smith, 2017; Smith & Osborn, 2009).

I designed the interview schedule questions in a cluster and sequential order that matched the phenomenon in question, following the guidelines provided by Smith & Osborne (2009). The questions should be geared towards the research phenomenon (Englander, 2012).

The questions were designed to prompt and to nudge and not to lead the participants. The open-ended questions were followed by prompts which are more explicit and specific around the topic. The same interview schedule was used for each participant however on the understanding that each interview flow and sequence would differ based on the participants' responses. The semi-structured interview has the advantage of facilitating rapport, it allows a greater flexibility of coverage and it allows the interview to go into novel areas, and it tends to produce richer data. On the other side, this form of interviewing "reduces the control the investigator has over the situation, takes longer to carry out, and is harder to analyse" (Smith & Osborn, 2009, p. 58).

The interview schedule for the first interview invited the participant to share their overarching leadership identity narrative. The first interview established rapport with the participant and offered some insight into the participants experiences of their identity as a leader and how this has evolved over their career (See Appendix B for Interview guide for Round #1).

The interview round two and round three homed in on the appraisal and responses to perceived identity triggers and identity development. The questions revolved around the phenomenon in question and asked such questions as:

- "What have been the events or experiences since we last met that have led you to think about your leadership? Share your experience of these.",
- "How do you view your leadership identity now and why?",
- "What influences you in how you view yourself as a leader?".

I chose to use the same interview guide for both interview two and three. The interview guide was developed to cover the ambit of the phenomenon and research questions. After using it in the first interview I found it covered the range of questions well and the timing worked well (See Appendix C for the Interview guide for Round #2 & #3). The interview guide as per IPA guidelines had some prompt questions to use to probe or follow lines of inquiry as they emerged in the interview. Being a semi-structured interview, I used this technique to follow the participants insights and to guide the questions to cover the span of experiences.

3.9.1. Interview schedule for data gathering

I scheduled the interviews on the following criteria:

1. Exposure to leader identity triggers with at least an eight-week period between each interview
2. Intervals between interviews staggered evenly over the period to be in between sessions held on the management development programme.
3. Three interviews were held per participant: the first interview explored experiences as a leader and the second two explored responses to perceived identity triggers and leader identity development.

I scheduled the interviews to be held in between the four study blocks so as to create some perception of distance between the research and the MDP. Data was gathered around events so was well-positioned to capture experiential transition and enables researchers to evidence the participants' progression over time (Farr & Nizza, 2019). They were quite separate from the programme, and I emphasised that I have no role in the MDP and that I would not report back to the programme managers in any way during the research.

The study did not research the MDP but uses it as a prompt for potential leader identity triggers and identity work. The participants were interviewed during times of their work schedule and identified which events and triggers prompted them, which may or may have included the MDP. I conducted the interviews in the participant's offices in a private meeting room for three of the participants. For two of the participants, we held our interviews over skype and telephone calls. For one participant we met twice face to face in a private meeting room at the business school and the final interview was telephonic.

The Figure 16 below outlines the timeframes in the research design.

MDP BLOCK 1	INTERVIEWS #1	MDP BLOCK 2	INTERVIEWS #2	MDP BLOCK 3	INTERVIEWS #3	MDP BLOCK 4
• April 9-11 2019	• April 26- May 22	• June 11-14	• July 22 - 31	• August 17- 24	• September 19 - November	• October 3-4

Figure 16

Interview time periods

3.9.2. Interview guide reviews

After each round of interviews, I reviewed the interview guides to check that the questions were gleaning insight into the phenomenon, as well as timing and flow. I kept the interview guides as they were as they also allow for flexibility in each guide, and I found they provided sufficient prompts for me as the interviewer to cover all aspects that I intended to in each interview.

Three findings emerged for which I did make some adjustments. Firstly, participants were sharing very few triggers despite much having transpired in their workplaces and having participated in the management development programme. I decided to send a mobile phone message or email to the participants ahead of the second interview asking them to consider the events and experiences which have led them to think about their leadership. This was to prompt the participants to consider a range of triggers over the period in between the interview and not only the most recent event. I also encouraged the participants to consider experiences they deem as positive and negative.

Secondly, I was sure to emphasise in each interview that the research is quite separate from the management development programme and that I would not report any findings back to the business school or programme managers. That is other than the final doctoral thesis when this becomes available publicly. This was to circumvent any respondent bias or positive confirmatory bias. Thirdly the interview conversation could also be a place of identity work for the participant as the questions become triggers to identity development insights. I would make note of any insights shared to this extent in the interview and would consider this in the analysis of the interview transcripts. As such the interview guides remained bar some grammar tweaks the same for all of the participant interviews.

3.10. Upholding ethical research through informed consent and anonymity

The overarching principle of ethical research is to avoid harm to any participant in the research (Guba & Lincoln, 2005; Lincoln & Guba, 2005; Smith & Osborn, 2009).

Informed consent was required from each participant prior to conducting the interviews. This is to protect the participant and assure them of their anonymity and for their right to withdraw from the study at any time. I discussed the informed consent and rights of the participant with each participant before commencing the interview and each participant signed a consent form which I kept on record.

The informed consent includes the following undertakings:

- i) Information on the context and purpose of the research and expected requirements of the participants.
- ii) Non-disclosure of personal identity or source of statements, i.e. participant anonymity.
- iii) Permission to make an audio recording.
- iv) Disclosure of any potential risks to the participants; in this case there are none.
- v) Voluntary consent to participate and right to withdraw.

The signed consent form contains the name of the participant and I retain these. The names of the participants and their employer companies are also anonymised in the data findings. All references to the participants following this are made using a coded initial for each participant. Assurances of the data anonymity and confidentiality were provided, and permission was obtained to digitally record and then transcribe the interviews. I have also kept the management programme anonymous as the programme is not studied and rather these are used as a source of participants who are exposed to the phenomenon in question and who meet the criteria for the study.

3.11. Data treatment

Digital recordings were transcribed verbatim, in accordance with the principles of IPA. Non-verbal behaviour is excluded, and the recording still requires a process of interpretation by the transcriber or any other listener.

For IPA, the level of transcription is generally at the semantic level: one needs to see all the words spoken “including false starts; significant pauses, laughs and other features” are also worth recording (Smith & Osborn, 2009, p. 65).

The data and documents were stored and backed up on my computer and using an external hard drive. This back up was stored securely with only me having access to the data via password control. Each participant has been allocated a coded initial to ensure anonymity of the participants. Only I have access to the list of allocated pseudonyms. The data was provided to the University as required for accreditation with password control. This will be stored for ten years by the university.

3.12. Data analysis methods and principles

In this section I outline the data analysis methods used and analyses conducted from the interview transcripts.

3.12.1. Interpretive analysis of interview transcripts

The researcher is active in the interpretation of the data. "Interpretation is similar to the work of detection. As such the researcher is mining the material for possible meanings which allow the phenomenon of interest to "shine forth"(Smith & Osborn, 2009, p. 35). Researchers are encouraged to work with their data in a dynamic, iterative, and non-linear manner, examining the whole in light of its parts, the parts in light of the whole, (Eatough & Smith, 2017).

Researchers imagine what it is like to the participant and at the same time are critical and probing of the meaning of this, which may not be verbalised or expressed directly by the participant (Eatough & Smith, 2017).

Interpretation occurs on a case-by-case basis on the idiographic principles. Idiography refers to an in-depth analysis of single cases and examining individual perspectives of study participants, in their unique contexts.

The fundamental principle behind the idiographic approach is to explore every single case, before producing any general statements. The researcher can make specific statements about study participants because the analysis is based upon a detailed case exploration. The IPA researcher will thus start with examining an individual and will move to an equally attentive exploration of the second case, and so on. This idiographic commitment is unusual even among qualitative methodologies. Be it the case, that the researcher wants to study a group of individuals, he or she will move between important themes generated in the analysis and exemplify them with individual narratives (how particular individuals told their stories), comparing and contrasting them (i.e., showing similarities and differences) (Pietkiewicz & Smith, 2012).

3.12.2. LIPA analysis

IPA is concerned with exploring the lived experience of individuals in a specific context. In longitudinal studies, IPA's inductive and idiographic mode of enquiry reveals individual trajectories that show how the participants' experience dynamically evolves within and between study time-points. The task for LIPA researchers when presenting their findings is to find ways to clearly express both the dynamism and nuance of individual trajectories as they evolve in the participants' temporal world (Farr & Nizza, 2019).

There have been primarily two core methods to structuring themes and presenting findings:

1. Themes spanning time – the findings are normally broken down into a set of themes, with each theme describing the progress over multiple time-points of a specific aspect of the participants' experience. This study analyses the themes spanning time.
2. Time points – The study is partly seeking to see how participants self-identify events and experiences and how they appraise these and what impact this has on their overall leadership identity. The time points are selected to be in between the development programme blocks suggesting opportunities for time points, but the interview and analysis is not based on these.

In this study each individual case is analysed at time points and spanning the time period. Cross-case analyses are conducted at each time point as they are spanning the time period.

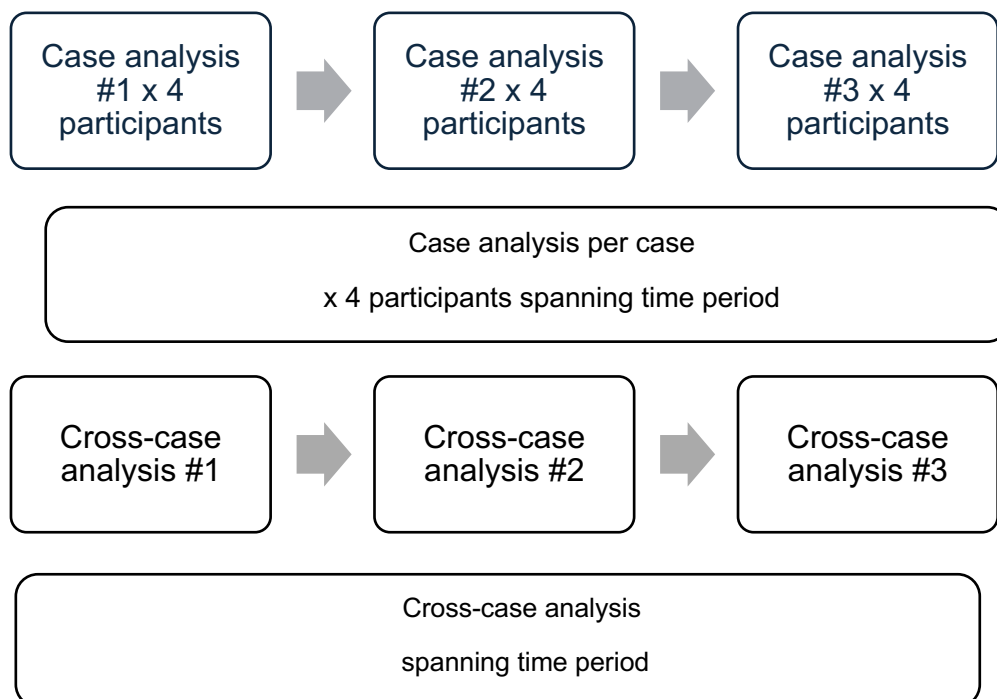


Figure 17

Time point and spanning time data analysis

Each participant experienced the phenomenon in different ways and since the time points were not pinned around significant events across the group the data analysis was not focused on the themes emerging around the time points of each interview. Rather the themes related to the trajectory of that participant over the period as relating to the phenomenon. Data findings were presented against one overarching narrative of one participant with frequent comparisons between participants, the focus is clearly both idiographic and longitudinal (Farr & Nizza, 2019).

The temporality of the experience in this study is to see how the participants experience their identity development over the period in relation to perceived triggers and how they appraise and respond to them. The time period offers time for a variety of triggers to be experienced. These experiences were expected to be differently noticed by each participant and this is a key point of interest in the analysis.

3.12.3. Data analysis

The table below outlines the incidents of data analysis per case per interview as well as over the time period, for the cross-case analysis as well.

Table 3

Table of data analyses conducted

Case	Time Point Interview #1		Time Point Interview #2		Time Point Interview #3		Time Period	
	Case Analysis	Cross-Case Analysis	Case Analysis	Cross-Case Analysis	Case Analysis	Cross-Case Analysis	Case Analysis	Cross-Case Analysis
1	X	X	X	X	X	X	X	X
2	X	X	X	X	X	X	X	X
3	X	X	X	X	X	X	X	X
4	X	X	X	X	X	X	X	X

The next section outlines the data analysis process followed by the researcher for the analysis per case, at each of the three time points. The data analysis process is depicted in Figure 18.

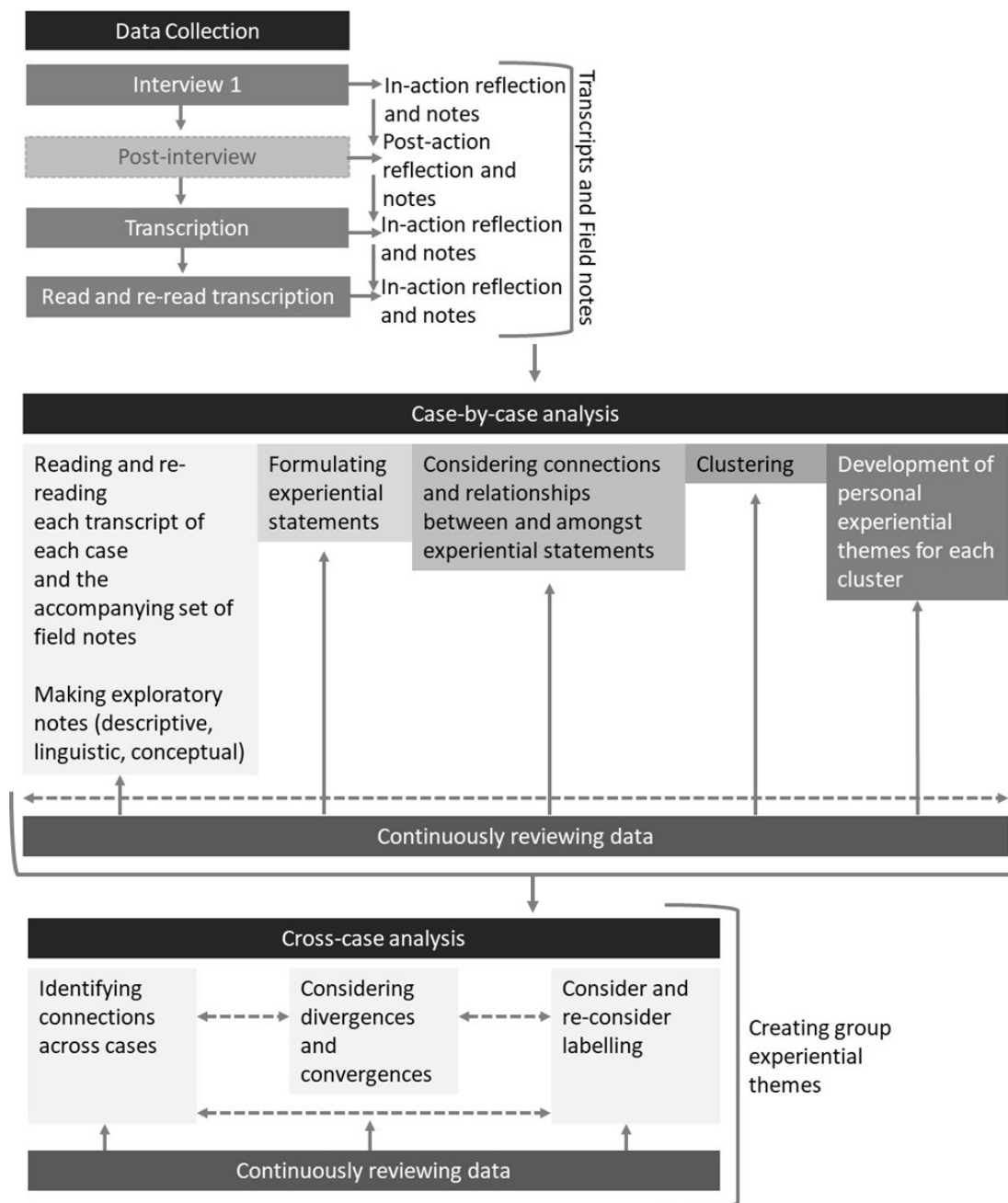


Figure 18
Data analysis process

The process of meaning-making and interpretation already started during the data collection process as indicated in Figure 18. The researcher used a journal and made reflection notes during the interviews of any salient points, important observations, and areas for further reflection. After each interview the data was transcribed. During the transcription process, the researcher continued to add reflections to her field notes. The researcher read and re-read the transcripts while listening to the audio-recording to ensure accuracy. As thoughts emerged during this process, these were also noted in her journal.

3.12.4. Data analysis steps per case analysis

I analysed verbatim interview transcripts which were transcribed from recordings of the interviews. I used a professional transcriber to type the initial recordings which I checked, and I listened back to the original recordings multiple times. I interviewed four participants three times each over an eight-month period for this study. The 12 interviews yielded transcripts of 26, 574 words.

The verbatim transcripts and field notes formed the basis for the subsequent case-by case data analysis. This process consisted of six interrelated activities. Although there is an order in which these activities were conducted, this is an iterative process and activities were revisited as deemed necessary. The dashed arrows indicate this iterative and interrelated process. The activities were:

- Reading and re-reading the verbatim transcript and the accompanying set of field notes
- Making exploratory notes (descriptive, linguistic, conceptual)
- Formulating experiential statements
- Considering connections and relationships between and amongst experiential statements
- Clustering
- Development of personal experiential themes for each cluster

The case-by-case analysis was obtained through a sustained engagement with the text (Smith, 2007, 2011b; Smith, Flowers & Larkin, 2022; Smith & Osborn, 2009; Smith & Nizza, 2021). This is indicated in Figure 18 by the arrows linking “continuously reviewing data” to each of the activities.

For each transcript the researcher made exploratory notes on the transcripts and thereafter reviewed the transcripts and full set of notes again before loading the data onto ATLAS.ti. The data was reviewed again, and descriptive, linguistic, and conceptual notes were documented using the “notes” functionality of ATLAS.ti. This activity was repeated a minimum of seven times. Thereafter the notes were reviewed, and experiential statements were formulated according to which data segments were labelled. The researcher then considered the connections and possible relationship between and amongst these experiential statements. This was done by copying the experiential statements onto a page and physically moving and grouping the experiential statements into clusters. The case-by-case analysis concluded with

a review of the clusters and experiential statements and developing personal experiential themes for each cluster and the labelling on ATLAS_{ti} was updated.

At no point during this process were the exploratory notes or experiential statements or personal experiential statements considered as final and changes were made throughout the process using the verbatim transcripts as core reference for making decisions.

As stated, the process outlined above was conducted for each transcript of the three interviews per participant. This yielded a time point analysis. Thereafter, a time period analysis across the three transcripts per participant was conducted. This was done by following the recommendations for cross-case analysis which will now be discussed.

Cross-case analysis involves a process where the personal experiential statements representing the clusters are reviewed across the full data set to identify connections and possible relationships across the full data set (Smith, 2007, 2011b; Smith, Flowers & Larkin, 2022; Smith & Osborn, 2009; Smith & Nizza, 2021). Although this process is focused on the cluster-level of personal experiential statements it also included consideration of the experiential statements within each cluster. The researcher continued iteratively with the cross-case analysis for the three time points as well as the cross-case analysis for the overall time period. The analysis occurred over a series of rounds entailing cross-case analysis of the four participants at each of the three time points and cross-case analysis of the four participants for the time period.

During this process, divergences, convergences, similarities, and differences were continuously and iteratively considered. Again, none of the previously formulated experiential statements or personal experiential statements were considered as set in stone and changes were made if the researcher arrived at new interpretations and insights using the verbatim transcripts as the basis to guide changes to previous labelling decisions. This process was conducted on ATLAS_{ti} and iteratively repeated eight times and concluded with the formulation of group experiential themes.

Thereafter the researcher constructed a final table of group experiential themes (GETs) indicating the personal experiential themes (PETs) that reside within each group experiential theme. The experiential statements linked to each experiential theme was also indicated. The content of the table was again evaluated to ensure that it represents an interpretative view of the lived experience of the participants. This formed a composite summary of the themes across the interviews representing in-depth insight into the phenomenon under study (Larkin

et al., 2019; Pietkiewicz & Smith, 2012; Smith, 2007, 2011b; Smith, Flowers & Larkin, 2022; Smith & Osborn, 2009; Smith & Nizza, 2021).

3.12.5. Double hermeneutic

Accessing this requires interpretation on the part of the researcher, whose focus on the participant's sense-making creates a double-hermeneutic, whereby the researcher is trying to make sense of the participant making sense of what is happening to them (Smith & Osborn, 2009). During this analytic process, there is a dialectical interplay between a part of the data, the whole and what else is known about the participant. With multiple data collection points, in LIPA the researcher encounters a series of wholes that, though independent, are also the constituent parts of the overall interpretation.

IPA's idiographic commitment focuses on the meanings of phenomena as they arise for a particular person in a specific context. It is this detailed focus on the particular that can reveal the changing meaning of an experience as it is lived through that person's trajectory (Farr & Nizza, 2019; Smith, 2007).

IPA aims at giving evidence of the participants' making sense of phenomena under investigation, and at the same time document the researcher's sense making. I kept a research journal during the study and included notes in my analysis where my perspectives and understanding of the phenomenon raised questions around the interpretation. This raised some interesting insights into the phenomenon as some findings ran counter to my expectations. These perspectives are made transparent in the analysis notes as they inform the overall analysis of the data and this is key to building the trustworthiness of the research.

3.13. Writing up the narrative

Writing up involves translating themes into a narrative account. In the findings I write up the findings using verbatim extracts from the data. In the discussions section the thematic analysis is linked to the extant literature interspersed in the discussion section.

Farr and Nizza (2019) outline ways to build the persuasiveness of researchers' claims and the readability of the findings. I have followed these guidelines in this paper and have drawn on the following:

- Used the systematic use of well-labelled quotes to evidence idiographic progress

- Developed convergence and divergence within and between cases
- Brought the findings together through the use of the narrative voice and temporal flow
- Moderated the complexity of LIPA designs through the use of a narrative voice that takes responsibility for clarifying, guiding and connecting the sequence of temporal shifts, while ensuring that the individual experience of participants continues to take centre stage and that validity is supported by grounding arguments in the data.

3.14. Limitations of IPA

According to Gill (2015) one of the strengths of using a phenomenological approach is the opportunity to examine participants' own accounts in detail and to tap into their significant constructs (Smith, 1999). Conversely, the idiographic nature of this study means it cannot make definitive claims beyond a small number of participants' accounts. A limitation of IPA, therefore, is that the findings cannot be generalised or abstracted to different populations or contexts. This research aimed to deepen an understanding of a phenomenon by contributing to the body of knowledge which can be taken further by academics, researchers and practitioners. The findings contribute to the research agenda and focus around the phenomenon in question.

Smith et al. (2009) refer to "theoretical transferability, rather than empirical generalisability" (p. 51) as a construct suited to phenomenological research. The insights and findings can inform practitioners and researchers in further advancing the study and practice around the phenomenon (Willig, 2008). Transferability is supported by the research design and data analysis process of this study and these are transparent and reference is made to verbatim extracts from the participants to support the trustworthiness of the data. The reader can follow the research process to consider how transferable the findings are across contexts (Smith & Osborn, 2009).

A potential limitation of IPA is that it relies on the 'eloquence' of a participant (Brocki & Wearden, 2006). A key assumption underpinning IPA is that participants are able to express their subjective experiences of a phenomenon. IPA does rely on a participant being able to express their views and for the researcher to record them correctly. But it is the researcher that interprets the account of their experiences as described by the participant. Larkin (2008) clarifies that it is through the double hermeneutic process that the researcher interprets the meaning of the participants expressions. The interpretation is considered in relation to the participants' form of expression and context (Larkin et al., 2011; Smith & Osborn, 2009). I

carried out multiple analysis of the data and given the longitudinal nature of the study I was able to gain insight into each participants' particular context and forms of expression to better understand and interpret their experiences of the phenomenon.

While IPA recognises the value of the researcher's perspectives for interpretation, these may both "hinder and enhance the interpretation of another's lived experience" (Shaw, 2001, p. 239) In this respect, IPA requires reflexivity from the researcher to explicitly present his or her own perspectives (Finlay, 2009; Larkin et al., 2019; Willig, 2008). As a researcher I kept notes during the research and am explicit about my perspectives which led to novel insights in the research findings.

IPA does not explain a lived experience of a phenomenon (Larkin et al., 2019; Smith, 1999; Willig, 2008) and this is true of all qualitative psychology, and as such this is not a limitation of IPA. IPA is explicitly interpretative. This study does not aim to explain why an experience occurs but rather to deepen an understanding of how the phenomenon unfolds in particular contexts. In this study I have made every effort to reinforce that the findings which are theoretically transferable, that the findings are trustworthy and that insight is gained around the phenomenon amongst a particular population. I worked with a research strategy that supports the trustworthiness of the research and this strategy is outlined below.

3.15. Trustworthiness in the quality of the research

The trustworthiness of qualitative content analysis is often presented using terms such as credibility, dependability, conformability, transferability (Guba, 1981). Lincoln and Guba (2005) and Denzin and Lincoln (2005) agree these criteria are necessary for qualitative studies.

These constructs have been widely accepted as the criteria for the researcher to use to demonstrate trustworthiness of qualitative research which differ from those traditional criteria of reliability and validity. Trustworthiness relates to the process of qualitative content analysis phases from data collection to reporting of the results. It is important to scrutinize the trustworthiness of every phase of the analysis process, including the preparation, organization, and reporting of results (Elo et al., 2014) as this builds the credibility of the findings.

Credibility (internal validity) attempts to demonstrate that a true picture of the phenomenon being researched is being presented. As a researcher I provide sufficient detail of the research

context and design for the reader to discern whether a context is familiar or not to allow for transferability (external validity) across contexts. Dependability (reliability) criteria focus on a researcher striving for a future study to be able to repeat the study, and if the contexts are found to be similar transferability can apply. The results need to be confirmable (objective) and the researcher must clearly show how the findings are drawn from the data itself and how the researchers' perspectives were considered (Shenton, 2004). I adhered to these guidelines for credibility and dependability as I share the context and the data analysis process and reflexivity for each case and cross case analysis.

Guba (1981) recommends providing a full description of the factors impacting the study. This should be sufficient for researchers to ascertain if their context is similar but not to support transferability of the findings. Although IPA as a methodology does not support transferability as a key objective as the research is based on individual experiences of the phenomenon in question (Gill, 2014; Larkin & Thompson, 2012; Smith & Osborn, 2009), this also does not negate whether the reader chooses to apply transferability principles.

I specify the research design, methods, and sampling procedure I used demonstrating dependability of the research. This includes the operational detail of data gathering and a reflective appraisal of the research project. (Shenton, 2004). So, the reader can discern the transferability in their context.

Part of gaining trustworthy data is that the participants share openly and freely with the researcher. I established a comfortable rapport with the participants in the interviews. Participants were encouraged to be honest in their contributions through the use of open-ended questions from a question guide and the assurance of anonymity. The participants could opt out of the study at any stage without any consequences to themselves. I held three interviews with each participant which also supports the credibility of the analysis as I gained insight over the eight months into each person and their expressions and insights. We had also built some trust and the participants shared openly around their experiences.

Miles and Huberman (1994) consider that a key criterion for confirmability is the extent to which the researcher admits his or her own predispositions. One way of supporting the dependability of the research is through the use of ATLAS.ti. This can facilitate the qualitative research process by making all phases of the investigation open to public inspection creating an audit trail and enhancing the trustworthiness of qualitative research (Sinkovics & Alfoldi, 2012). The confidentiality of the participant is ensured by the participant being allocated numbers in these documents. I use verbatim extracts to reflect the voices of each participant

and to highlight the themes for each individual and in the cross-case analysis to highlight the divergences and convergences around the experience of the phenomenon in question. At each point the original transcript is used in analysis at the individual participant level, at each time point and for the cross-case analysis. This aligns with the principles of idiography and interpretative analysis. I practise reflexivity as I change my design at the start of the study as a potential influence was identified and I kept interview notes where my interpretations may have been influenced.

In IPA credibility is important: “to ensure that the current account is a credible one, not the only credible one” (Smith & Osborn, 2009, p. 183). The account is not about testing a hypothesis, but it is about broadening and deepening the inquiry around a phenomenon. (Smith, 2004). IPA is not used to test theory by developing hypotheses (Eatough & Smith, 2017; Smith & Osborn, 2009). However, it may apply theory towards understanding the research questions and in doing so, the analysis may engage with a specific theory, model or framework (Smith & Osborn, 2009). The findings did build on theory and the analysis did iterate back to the theoretical frameworks for the phenomenon.

The research questions are premised around frameworks of the phenomenon of identity development which include triggers, appraisals, and responses. I outline in the literature review the gaps in the dynamics underlying the phenomenon which warranted this further study.

The conceptual framework was used to organise the research analysis in a systematic manner. It also structured the analysis so that the experience of the phenomenon for each participant was explored and a cross-case analysis could be undertaken. In this way, the analysis facilitated two levels of analysis. The first was to assess areas of similarity and difference between the conceptual framework and the individual participant accounts gleaned from the fieldwork. The second was the cross-case analysis in which the findings of each participant were compared against other participants. Good quality IPA includes attending to this convergence and divergence (Nizza & Smith, 2021)

The IPA method does not simply seek consensus with existing ideas, but instead considers areas of similarity and difference. Yardley (2008) said that the search for disconfirming evidence gives reassurance to the reader that the researcher has not selected outcomes arbitrarily or been selectively biased and it lends credibility and plausibility to the research process and the outcomes. The IPA method provides a means to systematically identify areas of difference, including areas of omission.

A key control over selective bias is the cross-case analysis so that none of the individual cases is viewed in isolation. In particular, areas of difference are carefully scrutinised to find further corroborating evidence or alternatively, to confirm that the evidence supports the assessment of a unique perspective. The comparison allows areas of similarity to be assessed, differences to be scrutinised and omissions to be highlighted.

In addition, to ensure that the analysis process is rigorous and upholds quality requirements, the IPA audit trail ensures transparency by making the process open to scrutiny.

Yardley (2000) provides four broad criteria for validity in qualitative research, each of which I have followed in the design and analysis of the research findings. These are:

- a. *sensitivity to context*—of both the participants' experiences on one hand and the existing literature on the other.
- b. *commitment and rigor*—including attentiveness to the participants and the data, along with consistent prompting/follow-up for greater depth of analysis. Dependability will be reinforced through my rigorous research design that could be repeatable.
- c. *transparency and coherence*—to provide logical and coherent themes, arguments, and analysis of ambiguity. Access to the coding and thematic analysis. The use of verbatim quotes will reinforce this.
- d. *impact and importance*—in order to ultimately tell the reader something interesting, important, or useful.

To support the transparency and trustworthiness of the research study I further declare and manage my association with the business school from which the participants sample we selected.

3.16. Further ethical issues

I am a professional associate and part-time faculty for the business school. Although there is no formal link with myself and the MDP as I am not involved with this programme in any way, I am still associated as faculty with the business school. There is still a power dynamic to be recognised in this. The participant may feel either intimidated to open up and appear vulnerable or the participant may be concerned about giving the 'right' answer, which would limit the authenticity and hence value of the participation.

I established a rapport and trust with the participants to eliminate such concerns, from our initial interactions as a researcher and throughout the ten-month engagement. I also undertook to not report back to the programme director or faculty. I put steps to gain informed consent, beneficence (do not harm), respect for anonymity and confidentiality and respect for privacy. This I emphasised at the start of each interview over and above the signed consent and personal assurances.

A further factor relates to retaining the confidentiality of the anonymity of the participants as a part of the ethical commitment of the study not to reveal the identity. In doing this I did not reveal certain personal or company information that assisted in the analysis but was not revealed to the reader. Names were made up for each participant which also disguised the face of the participant even though this was not a focus of the study, it through the personal circumstances shared provide some input into the analysis. The use of a peer researcher did support this in reviewing the process from data to analysis to reporting findings and providing input to ensure rigour and trustworthiness throughout the study.

3.17. Conclusion

As stated in Chapter 1, the research question that guided this study is two-fold:

- How do managers appraise potential leader identity triggers?
- What is the impact of this on their leader identity over time?

In order to answer the research question, I applied the principles of IPA as discussed in Chapter 3 and briefly summarised here. Following on a full immersion in the data over several re-reads of the transcripts, with several rounds of exploratory notes, I captured the exploratory notes in ATLAS.ti which includes notes on descriptive findings, linguistic findings, and conceptual findings. I then captured these experiential statements in the codes per time point and per participant. From here I drew the codes list and frequency to analyse the findings. Although frequency is not a focus of IPA it does signal the importance of a factor or dynamic to an individual at that time point. This was helpful to facilitate the move to the next part of the process which is formulating the personal experiential themes (PETs) per case per time point. I mapped the PETs in an Excel spreadsheet. From here I analysed the cross-time points per case. Using the guidelines this resulted in between 3-5 PETs per case, per time point as recommended by Smith and Nizza (2021, p.47).

From here I analysed the time period, cross time point analysis per case, and drew this into a final table of group experiential themes (GETs) from the PETs per case time point. This resulted in between 3-5 GETs per case. The GETs were used in the cross-case analysis for the time period. (Smith and Nizza, 2021; Smith et al.,2022). These are captured in a table in excel as encouraged by Smith & Nizza (2021) and the second edition of Smith et al. (2022). “The table can also be said then to illustrate the interpretative endeavour which has taken place” (Smith et al., 2022, p.95).

Throughout the process I engaged with a peer researcher who also read and re-read the transcripts upon which we engaged in in-depth, critical discussions of the text and possible sub-texts, emerging patterns, and themes to ensure that no nuances were missed, and that any possible researcher bias were uncovered and considered in the interpretation of the findings. This was to consider multiple perspectives in the analysis to develop coherence and plausibility of the interpretation. This was also to check alignment that the principles of IPA we adhered to.

As the qualitative researcher is an interpreter and co-constructor of the meanings generated through analysis, I was aware of the risk of confirmation bias where I only find what I am looking for. Through engagement with the peer researcher the meaning-making process was rigorously reviewed.

The narrative account of the analysis is included below in this chapter. The commentary includes illustrative data extracts and visual guides based in the data collected in the interviews across the three time points, over the time period of eight months.

I selected a qualitative interpretive study to address the research questions and studied managers experiencing the phenomenon using the longitudinal interpretive phenomenology analysis methodology. Four participants were drawn from those participating in a management development programme at a business school. The participants would have had access to identity triggers in the programme and by virtue of their management roles in corporations. I selected a sample employed as managers at the same level across the same sector. The data was analysed using the LIPA guidelines and resultant themes emerged to better understand the dynamic phenomenon of leaders’ identity development.

Efforts were made to reinforce the trustworthiness of the research and research findings through the transparency of the researcher perspectives, using verbatim extracts from the participants, multiple rounds of analysis of both case and cross-case analysis to gauge the

case-by-case experience over the period of time and to gauge the similarities and differences over the period of time.

The following chapter presents the key findings of the study on leader identity development of managers over time.

Chapter 4. Presentation of findings and discussion

4.1. Introduction

As stated in Chapter 1, the research question that guided this study is two-fold:

- How do managers appraise potential leader identity triggers?
- What is the impact of this on their leader identity over time?

To answer the research question, I applied the principles of IPA as discussed in Chapter 3 and briefly summarised here. Following on a full immersion in the data over several re-reads of the transcripts, with several rounds of exploratory notes, I captured the exploratory notes in ATLAS.ti which includes notes on descriptive findings, linguistic findings, and conceptual findings. I then captured these experiential statements in the codes per time point and per participant. From here I drew the codes list and frequency to analyse the findings. Although frequency is not a focus of IPA it does signal the importance of a factor or dynamic to an individual at that time point. This was helpful in moving to the next part of the process which is formulating the personal experiential themes (PETs) per case per time point. I mapped the PETs in an Excel spreadsheet. From here I analysed the cross-time points per case. Using the guidelines this resulted in between 3-5 PETs per case, per time point as recommended by Smith and Nizza (2021, p.47).

From here I analysed the time period, cross time point analysis per case, and drew this into a final table of group experiential themes (GETs) from the PETs per case time point. This resulted in between 3-5 GETs per case. The GETs were used in the cross-case analysis for the time period. (Smith and Nizza, 2021; Smith et al., 2022). These are captured in a table in Excel as encouraged by Smith & Nizza (2021) and the second edition of Smith et al. (2022). "The table can also be said then to illustrate the interpretative endeavour which has taken place" (Smith et al., 2022, p.95). The narrative account of the analysis is included in this chapter and this contains detailed commentary with illustrative data extracts and visual guides.

I provide a visual depiction of the GETs and PETs to ensure a clear overview of the findings is provided from each participant upfront. This is followed by verbatim quotes from the data as it relates to a particular PET. Each section concludes with a discussion of the findings per participant. Thereafter, an integrated discussion of the findings across the full data set follows. The chapter concludes with a discussion of key insights that emerged from the findings followed by the presentation of the framework that was developed based on these findings.

4.2. Kay: overview of group experiential themes

In this section I provide an overview of the four GETS over the full period for Kay: self-identity weak, leader identity weak, leader identity developing – shift in leader identity narrative, and leader identity response. I provide the findings and respective quotes illustrative of each GET.

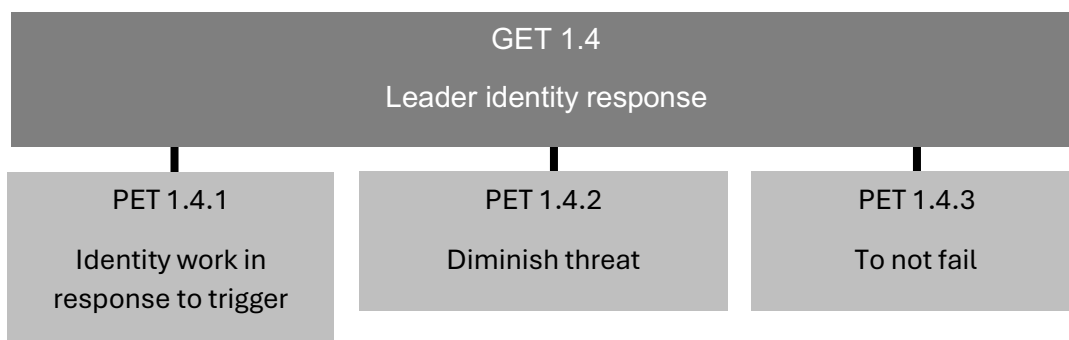
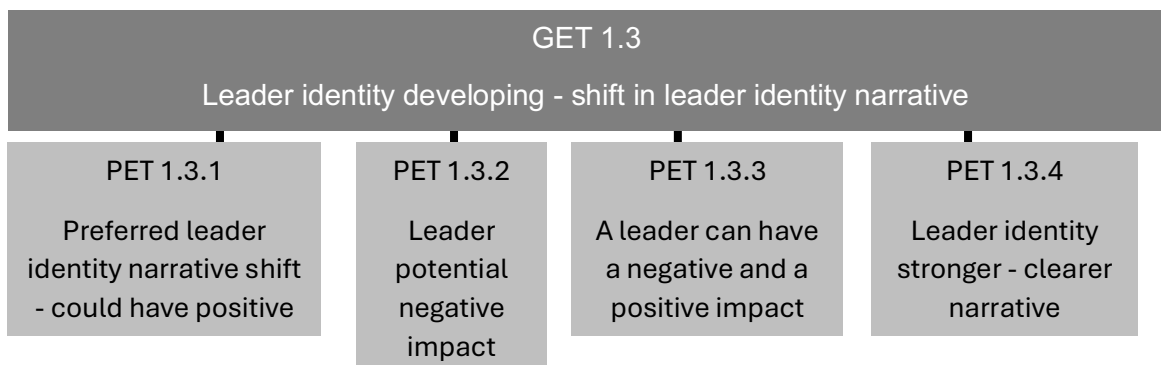
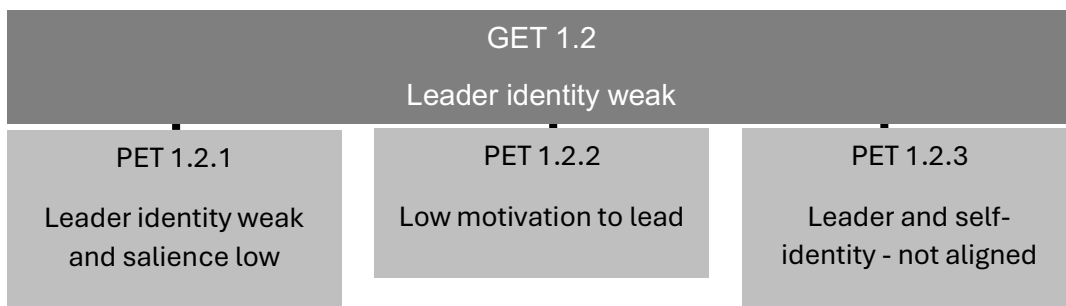
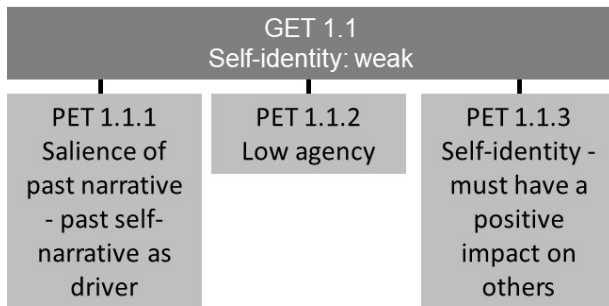


Figure 19

Group experiential themes over the time period for Kay

4.3. Discussion from Kay's findings on GET 1.1: Self-identity weak

I held my first interview with Kay in a large sunny boardroom. We sat at the end of a large white table with glass panelling overlooking the rest of the office and the view of the neighbouring sky-scrapers. She was fidgeting, smiling broadly, and seemed unsure of herself and asked why she was chosen to participate. She asked to be reminded about the purpose of the interview was and what was expected of her. These are the findings that transpired over the eight-month time period.

In the following sections I will outline each of the themes with related quotes from the interviews to demonstrate the findings for Kay.

The first group experiential theme is that Kay's self-identity is weak. This theme contains three personal experiential themes (PETs) of the salience of her past narrative, low agency and her self-identity informing that she must have a positive impact on others.

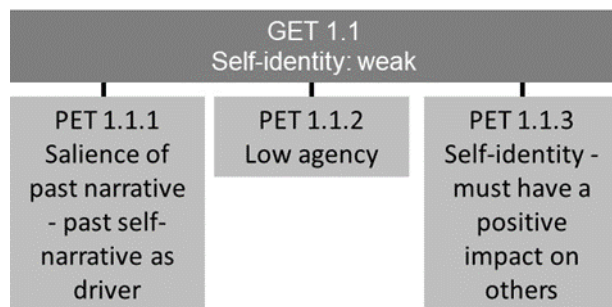


Figure 20

Group experiential theme for Kay: self-identity weak

4.3.1. PET 1.1.1. Salience of past narrative – past self-narrative as driver

The narrative Kay tells of her personal journey is one of growing up in a lower income, high density settlement, where unemployment and poverty were rife. Her story is one of successfully escaping the clutches of the socio-economic environment into which she was

born and reared and wanting to, of needing to prove to her family and the community that such was possible.

“It is also very, very important to me... my mom was a domestic worker and for a long time I grew up living in the maid’s quarters with her and then we moved to (township) ... and then you’re surrounded by hopelessness! You really, really are! You really, really are! And very few people make it out of that. So, it is a hell of an achievement to make it out of there! It is massive!” (TP1, No. 1:52, Ref 69)

“(I)t has become more important to me as I get older, that it is important to go back and inspire people in [township]. ...they want people to just come and tell their stories. Like ‘I was here!’ you know? And it is possible to actually make it! It’s possible to break out of that – but you have got to want to, and you have to be deliberate about doing something about it.” (TP1, No 1:53, Ref 69)

In this narrative she says it was hopelessness that was the driver that forced her to break out of the mould that defined her life and take the necessary actions to achieve this. This narrative of past provides an overarching narrative of self-identity and remains a key reference point to Kay., which is amplified in her work life.

“When I am doing well and hitting my metrics it makes me happy. ... I will tell you what kind of drives me: a lot of my family seeing that it is possible” (TP1, No 1:51, Ref 67)

4.3.2. PET 1.1.2. Low agency

Although the past self-identity narrative claims personal agency of achievement and of being able to break out of hopelessness, she actually demonstrates a low agency around her career development and career progression as she considers offers that come her way.

In her narrative of career progression Kay reflects an external locus of control. She joined a financial services company that had awarded a scholarship to her to complete her studies and she continues in the employment of that company to date. She is comfortable in her role reporting to an executive so much so that she ‘overstays her time period with that boss. She chose to remain at the firm as it expanded during an acquisition period. She was then approached by the sister company to take on a role with them. She only then moved roles and has remained in this role since. She had declined two subsequent offers that year to apply for more senior roles. She does not initiate the role changes in her career progression and does not drive the changes.

Senior members of the organisation approached her to consider new roles, and she responds to these approaches. When she did move from her last role she feels as if it is 'breaking up' with her boss, it is that difficult for her.

"I just never moved because I loved where I was, and I was comfortable, and actually finally when I got approached and I sat with my boss and I said, 'Well we knew this day was coming' and he said, 'You know what, I actually feel like you are breaking up with me!' (laughs)...' So that was quite difficult". (TP1, No 1:18, Ref 33)

"I was actually approached by the head of insurance... to come and join his division. ... I had over-stayed my period with my boss" (TP1, No 1:20 Ref 30)

The external locus of control reflects in Kay's journey of her childhood memories of being asked to be a leader. Her leader identity was neither conscious nor formulated, nor salient.

"So definitely not at school because I was naughty!... No typical leadership there! But actually, now that I think about it, even at school when we had team stuff, they would ask me to be the team leader". (TP1, No 1:2 Ref 18)

"(B)ut then you don't even realise what it is; you actually think 'flip now it is more work for me, I have to coordinate everybody and make sure that things get done!' But I suppose now I look back and reflect – and I haven't ever really done that". (TP1, No 1:3 Ref 18)

Kay's view of being a leader is multi-fold. On the one hand she sees it as something that would force her to work more. However, she also fears the high level of responsibility that a more senior management role brings.

4.3.3. PET 1.1.3: Self-identity – must have a positive impact on others

A seminal reason Kay cites fearing a more senior role is that it carries a huge responsibility and that there is also a greater pressure to succeed. Her past self-identity narrative is amplified in the leader identity narrative for Kay. She is driven by a desire to enhance and improve the life experiences of those around her and those she works with and to prove to them that success is possible and that they can improve their socio-economic environment. This means a responsibility to have a positive impact on others, and in Kay's case, an obligation to genuinely care for others wellbeing and success.

Herein lies the dilemma for Kay, as she sees that being a leader does require that there will be times when tough decisions need to be taken or difficult conversations need to be had, which may actually not have a positive impact on others. Kay never wants to be the “cause of someone’s misery” as this stands in stark contrast of genuinely caring for people and having a positive impact on others. This causes tension within Kay between wanting to have a positive impact on others yet holding a responsible management role which potentially has a negative impact on others.

This tension plays out within her inter identity network between her self-identity and her leader identity..

“Because when you have to deliver something yourself you are in control of it, in charge of it,...– and when you lead or manage people you have to really be truly, generally concerned about them; it’s not just about the outputs, but you genuinely have to be concerned about the space they are in, what they are going through – and all of that!” (TP 1, No 1:9 Ref 21)

“But it is about genuinely caring about people - genuinely – not because they are a number and they need to deliver results, and you need to be harsh when you need to be harsh, but it is genuinely giving people space to thrive; and I think as a leader you need to create the environment for people to thrive.” (TP1, No 1:25, Ref 35)

“And that is something I have always told myself, that I never want to be the cause of someone’s misery! And yes, as a leader you have to make some difficult decisions and have difficult conversations, but they need to be fair. And that’s what I am trying to do.” (No 1:32 Ref 37)

“I think it is just being conscious and deliberate, because you’re human and there are days when I wake up and feel ‘Flip, I am not even in a good space, how do I even lead other people?’ But then you have to be deliberate and conscious about it and say ‘Well people actually need me’ – I mean that sounds so ‘ah, people need me’ but people really genuinely do need me to show up as a leader you know? Just get dressed and show up and try.” (TP1, No 1:33 Ref 39)

The identity work for Kay is, on the one hand, her self-identity narrative is driven by having a positive impact on those she leaders, the need to ensure people advance towards a better place/ position in their lives and showing them and proving to them that success is possible. Yet inherent in the leader narrative is the fact that it is leaders who take the tough decisions in

order to lead. Yet Kay believes a leader needs to genuinely care for people. Over and above this leadership at a higher level, means for Kay, giving of oneself, regardless of one's state of mind. The leader is always required to show up.

4.4. Discussion from Kay's findings on GET 1.2: Leader identity weak

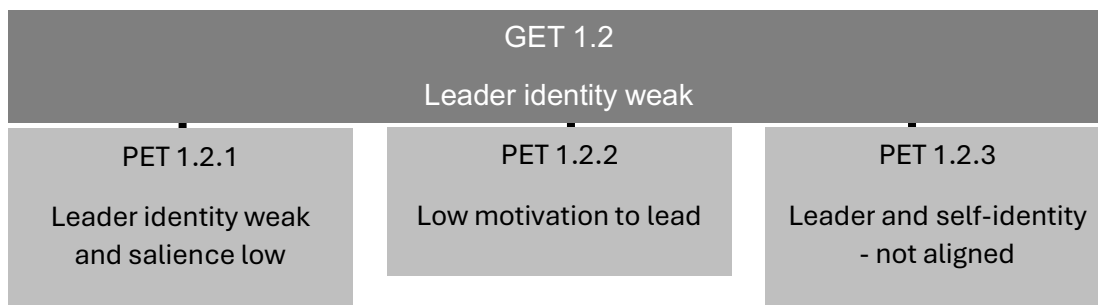


Figure 21

Group experiential theme for Kay: Leader identity weak

During the first interview, I prompted Kay to share her experiences of being a leader. Kay spoke of her role tentatively and shared her journey to becoming a general manager. I used prompting questions, and not definitions, in order to bring to the surface the assumptions and beliefs held by the participant. The assumptions presented by Kay were the following: a leader identity equates to a manager role, and that leader identity development is on par with career progression.

4.4.1. PET 1.2.1. Leader identity weak and salience low

Kay does not provide a clear descriptor of how she sees herself as a leader. She is vague in references to her leader identity and even in her role description, she appears to place a distance between her personal self and her leader identity. The leader identity is referred to as an action, a leadership style, an act, a role. The tie between the self-identity and the leader identity is weak.

“And I think back then there was probably very little definition between leadership and management, I mean you were a manager, but I suppose when I look back now there were leadership things that you had to do; there is a time to lead and a time to manage – even a small team”. (TP1, No 1:8, Ref 19)

“I started leading bigger teams and the lessons that I learnt when I was in that exec team are lessons that I tried to introduce into my leadership styles, and you get better; ... you clean out things that don’t work for you, because you can’t be somebody else.” (TP1, No 1:23, Ref 33)

“But my first leadership position when I thought ‘Okay now I’m a leader I can actually act like one’ – and felt quite conscious about it, was flip.... ...and I had one person reporting into me.” (TP1, No 1:63, Ref 19)

Her leader identity is apparently weak and has a lower salience in her intrapersonal leader identity network, to the self-identity, and the tie between the self-identity and leader identity is existent but weak.

- *Leader identity more conscious*

At timepoint 2 Kay demonstrates that she is more conscious of her role as a leader and is grappling with her leader identity. The reason being is that she is experiencing the pressures of environmental constraints, and her leadership is being tested under these conditions. In other words her leader identity is triggered, raising its salience and through which she experiences identity work. This identity work is in relation to her past self-identity narrative driver, particularly her repeated need to ensure those she leads find a means to advance in their lives and enhance their lives and in so doing constrain any negative impacts on them.

“Actually, it’s been crazy, um, it really, really has been. It’s I think tested all my leadership abilities, it’s just a tough environment, um, we obviously deal with clients, insurance, and money and etc, and the economy is not fantastic at the moment.” (TP2, 2:2, Ref 3)

“And you know people are under strain, they’re just pressurised, you don’t stop because I’m in the sales environment ... and I work, my team is a team of commission-earners. So, if they don’t make the sales then it affects their income.” (TP2, 2:1 Ref 7)

“..success would be for me now is in this challenging time it’s really navigating people through this difficult time ... we earn commission ..., so for me that’s the measure of success, that I can make sure that people believe and earn.” (TP2, 2:33 Ref 223-229)

Kay has an overarching filter to review the contextual pressures with a sense of her responsibility for her team to prove it is possible- to give hope and earn. She is concerned that

she must show her team what is possible, that she must guide them through the difficult times, and ensure her team earns. She is also concerned that she succeeds. Her self-identity narrative filters her appraisal of the environmental triggers. Her leader identity work is triggered, and she is more conscious of the potential positive or negative impact on her team, and the responsibility this holds for her as a leader of the team. This is a shift from timepoint one where she was fearful of the negative impact whereas now Kay expresses a leader can and does have both a negative and positive impact on people's lives.

This is an internal battle for Kay still. That a leader can hold such great responsibility over people's lives is something she continues to grapple with.

"But that is what I find most difficult, that is what I battle with the most. Knowing that what you do could really impact a person in a big way, their whole life, livelihood. It's a big responsibility. Ja, that's the one thing I don't like about leadership. I mean the flip side is you can really make a meaningful difference in people's lives, so I always have to remember that. ... but there's a lot of decisions one makes that are fantastic for people! As I said at the moment my leadership is being tested" (TP2, 2:27, Ref 159-171)

"Ja, no it just, it just made me think about how profound and important um your role is as a leader; because ... with the same set of circumstances you can either make or break a team." (TP2, 2:12 Ref 37)

"Just being conscious of it, that it can break your team and it can just ruin, you know morale." (TP2, 2:16, Ref 49-53)

4.4.2. PET 1.2.2. Low motivation to lead

Kay is less conscious of her leader identity at our first time point during interview 1:

"I suppose in a way you are a leader; you play leadership roles without even being conscious of it; just if things need to be done and you take charge and you say, 'Well I suggest we do this, can we do this?' – just because you want to get things done." (TP1, No 1:5 Ref 18)

In fact, Kay also shares that she was resistant to being in a leadership role early on in life and into her career:

“At school there was some sort of leadership type of roles that I played with team projects, which I didn’t give much thought to, and it wasn’t necessarily what I wanted – irritation!” (TP1, No 1:4 Ref 18)

“So, I had one person reporting to me and strangely enough, I at that point decided I never wanted to manage people ever again in my whole entire life!” (TP1, No 1:6 Ref 19)

“I was fairly young, I must have been about 25, so I mean that was like a lot of work, I never wanted to do that again! (laughter)” (TP1, No 1;16 Ref 21)

4.4.3. PET 1.2.3. Leader and self-identity – not aligned

Kay shares that much of her learning came through observation of other executives, her manager and colleagues. Interesting that she learns from observing others which infers she is not responsible for the leadership actions or impact. Learning by observation keeps her safe and distant from having a negative (or positive) impact on others. She observed different leadership styles and saw the various impacts both positive and negative that leaders can have on people, and she therefore explores what her leadership identity may be before she attempts to develop her own leadership style and leader identity:

“And I was so fortunate that I could actually observe that without having to take on that responsibility at that time. And I almost learnt what the kind of leader was that I want to be, and definitely what I wanted to be – just by observing.” (TP1, No 1:14, Ref 24)

“I think that was the turning point. So it was role specific, it wasn’t about me being an actual leader in the typical sense of the role, but it was just the observation of that exec team.” (TP1, No 1:15, Ref 26)

This does change over time as Kay experiences first-hand the leader identity triggers of a constrained environment and through experiencing leader identity work, as she leads herself and her team through these challenging times. Kay does shift her leader identity narrative, over time.

4.5. Discussion from Kay’s findings on GET 1.3: Leader identity developing – shift in leader identity narrative

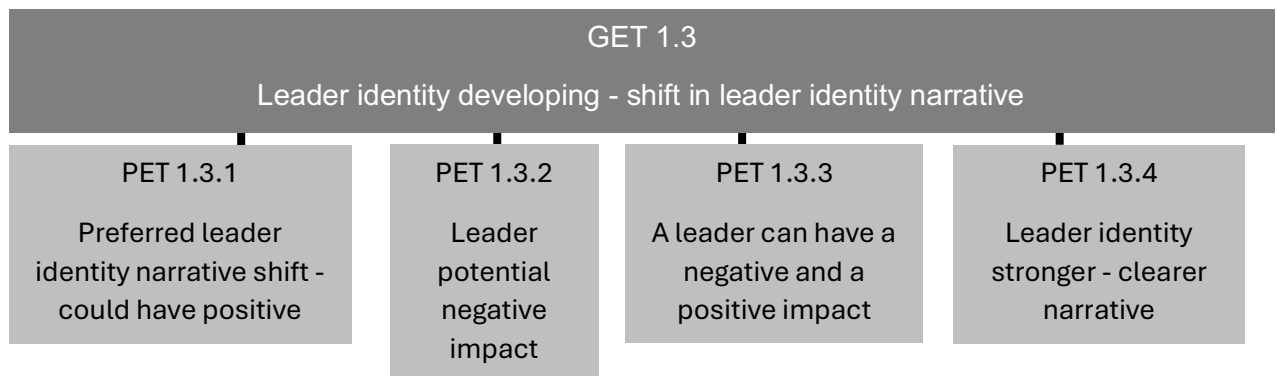


Figure 22

Group experiential theme for Kay: Leader identity developing – shift in leader identity narrative

Kay experiences tension and a battle in her leader identity work between the narrative that a leader can have a positive impact on people, and that a leader must have a positive impact on people. Alongside this is the danger that a leader can have a negative impact on people and this ought to be avoided where possible, and it is this that makes the immense responsibility of leadership too much for Kay to contemplate, particularly more senior roles which can be overwhelming in Kay's view. However, Kay experiences an emerging realisation and insight through her leader identity work that a leader can have and does have both a positive and a negative impact and that both can exist in parallel.

This narrative then begins to shift for Kay into a leader identity in which she would want to largely have a positive impact on people, and the realisation that this can be achieved through greater leadership responsibility. The leader identity work is driven by the underlying past self-identity narrative and it shifts as she finds tension, and then alignment in the identity hierarchy between the self and the leader identities.

4.5.1. PET 1.3.1: Preferred leader identity narrative shift – could have positive impact

Kay indicated in the first interview that her preferred leader identity is aligned with wanting to have a positive impact. She described it as the feeling of having achieved something and of leaving people a little better than she found them. She wants to see her team succeed:

“I want to really feel like I am achieving something, and also leaving people a little bit better than I found them. That broadly is it – but I haven't really crystallised it enough. I do know that when I see someone in my team succeed, I am happy – I know that”
(TP1, No 1:49 Ref 65)

4.5.2 PET 1.3.2: Leader potential negative impact

Kay experiences a tension in her identity work in the interplay between the self-identity and leader identity narratives. Being responsible for others and caring for others and not failing of the self-identity narrative overlays or supersedes the leader identity narrative, which may have a negative impact, may result in the leader being harsh, or be the cause of someone's misery.

"So, I think it's just been a continuation of growth, in insurance is when I started appreciating that you can make an impact, and really impact people seriously. I mean people might not want to come to work because of you. That's the power you have as a leader. Somebody can be sick and have knots in their stomach and not want to come to work because of you!" (TP1, No 1:29, Ref 37)

On a field visit with her direct manager Kay observes a colleague being 'broken' by his manager not handling a given situation appropriately or well.

"Yesterday was definitely one where the penny dropped again. So sometimes you do things without realising what you're doing, but when you're talking to someone and you see the impact of a different kind of leadership style, then you think about ... are you doing the same or is there an opportunity to just think about things differently." (TP2, 2:19, Ref 79)

"And I actually said to my boss 'This is such an important lesson as a leader, that when you're under pressure and stress, it's not to just transfer it as it is – your pressure directly as it is to your team who then transfer it to their team and then the whole system is comatose because we're all stressed and then we don't operate optimally because we're all stressed'" (TP2, 2:7, Ref 29)

Kay learns through observation and notices how the leader has a negative impact on his team. She resolves once again to have a positive impact on her team and through being more conscious of her leadership and leadership style, she chooses a response to the trigger.

4.5.3. PET 1.3.3: A leader can have a negative and a positive impact

Kay reflected on the fact that a leader can have a positive and a negative impact.

"Fast forward, just in terms of leadership roles, and I think it has a lot to do with maturity as well, when you grow and have a better sense of appreciation of what being a leader

is, and that you actually can impact things positively and people positively, and it is not just about making sure things are done but you can make an actual difference in people's lives.” (TP1, No 1:10, Ref 22)

“I saw execs at play, and I saw divisions that did well and the kind of execs that led it, and divisions that didn't do so well and the type of leaders that led that! And actually, it just struck me, that the leader can really make a huge difference in terms of the output of the business and how happy people are or aren't.” (TP1, No 1:13, Ref 24)

4.5.4. PET 1.3.4: Leader identity stronger – clearer narrative

At time point three Kay felt more confident in her leader identity and it has subsequently risen in salience. She is also more conscious of her leader identity. She has received external validation from her peers on the management development programme as well as from her manager. As she reflects upon what the year has brought her and acknowledges that it has been her most challenging year yet, she is confident that she has developed as a leader in this time. Her leader identity work has been triggered in response to what she appraises as a leader identity trigger.

“I was chatting to my boss; this has probably been one of the hardest years of my entire career. Literally. Just because of, it, it seems to have been a perfect storm so. I had vacancies which obviously puts pressure on the system. The economy is actually taking a strain as well. So, you know the numbers aren't where I'd like them to be. Um, ja, they've just, and then I've had just a few forensic cases. Ja, so anything that could go wrong, went wrong this year.” (TP3, 3:6, ¶ 120–136)

Her leader identity is more salient and her identity work brings a sense of greater agency to Kay around her leadership choices. She has developed a clearer language around her leader identity and can be deliberate and intentional in the way she performs her management duties and acts with agency in her role. Kay's leader identity has grown in salience, meaning and strength.

“So, I was able to share quite a lot of what I've done with people actually quite appreciative. (Laughs). So, I think sometimes you don't realize how you're really getting things right. Because it's easy just to see that things are just not working. And that's also been kinda a lesson for me, to just say you know, by you, by the things that, that you do, do well.” (TP3, 3:4, ¶ 84–90)

“So, this has been um, a big growth, year for me in terms of my, my leadership.” (TP3, 3:10, ¶ 164)

“Um, on the program has been instrumental in, in me actually just, thinking about the kinda leader that I, that I have been. So, if I look at the beginning of the year. I was acting, I was, um, I was a leader, and I was just doing stuff. And now I'm more conscious about what it is that I wanna do. Giving it language. Giving it words. ... so that you can actually be more deliberate about certain things.” (TP3, 3:11, ¶ 172–185)

“Opportunity came up. People came to talk to you, oh great, okay I can do something different... and then suddenly you realise. Flip this is actually a big responsibility. And this is what this year has become for me.” (TP3, 3:44, ¶ 445–453)

“It's so nice... Understanding what has led to, to me being where I am. And the successes that I've had. Or how, how I'm perceived. ...Sho actually. I need to continue on it and also I need to be conscious about what sort of leader I'm gonna be. Now that I realised what leadership can be.” (TP3, 3:46, ¶ 482–494)

There is a theme for Kay of wanting to positively influence others as a leader, through teaching, through helping them to grow and achieve.

“I was reading something about good leaders are actually about teaching. ... I thought I must actually, make more time in my team meetings to just share teachings. ... there's a lot to learn from others, but there's a lot to offer.” (TP3, ¶3:38, 94–102)

“Help people to really grow and achieve. Um, I tend to, to, to, to maybe not always upgrade at the right level because I like to see things done and if I don't see things done I, I do. You know, dip, dip the level. So just about being conscious of not trying to solve everything... Give people space to, to really do what they need to do. Ja, it's, it's good because it was unconscious. Now it's conscious.” (TP3, 3:23, ¶ 277–295)

Kay does attribute the management programme with giving her perspective and affording her a chance to reflect on leadership.

“The program. But it was actually the best year to do it. Because all the, because of the kind of year I had, I needed something else just to, to give me perspective consistently.” (TP3, 3:7, ¶ 138–142)

“So, so actually it has been the, the program itself has been the best thing that could happen for me in this very difficult year.” (TP3, 3:8, ¶ 150 – 154)

Her leader identity is more salient and this is raising more questions for her in her leader identity work. The questions that arise for her are around the responsibility of leadership and linked to that responsibility is the ability and power of a leader to bequeath a legacy of positive impact. Being conscious raises the pressure for Kay to succeed, to not fail. Yet she now sees that she can have greater positive impact and leave a greater legacy as a more conscious and intentional leader, and in more senior leadership positions.

“I'm in quite a, I'm in quite a weird space at the moment in terms of clarity and more questions.” (TP3, 3:21, ¶ 265)

“

So that's why I say, this in the, everything that's happened this year has um, made me a better leader. It's actually conscientized me around, flip this leadership is a big responsibility.” (TP3, 3:2, ¶ 441 – 443)

“Um, actually now that I think about what leadership is. It's a big responsibility. I've never thought about these. I just thought I was progressing in my career.” (TP3, 3:30, ¶ 457)

“Less, less aware about ah, the responsibility of leadership and how you actually need to be conscious and deliberate about some things. And maybe just be clear on the kind of leader that you wanna be.” (TP3, 3:31, ¶ 470 – 472)

“I'm living proof that it is possible to, to still get the driver element, but just shift your perspective about how you gonna get it and how you gonna get it is just through it.” (TP3, 3:42, ¶ 399 – 417)

“It's, it's, now there's a bit more pressure. As opposed to just willingness, now I have to. So I, I think there's always a need to do more. You know, a legacy, it's an ongoing journey. It's not something where you just tick a box ... I think you always growing and learning as a leader. But in as far as you cultivate the way the legacy is. ...I'm comfortable with the trajectory it's taken so.” (TP3, 3:51, ¶ 297 – 333)

“In terms of the impact, I have on people. That, that's what fulfils me. After all, ja it's the impact. Probably more than it is, you know? Ja I think as you go higher. Your

influence is broader. And it's about what you do with it so. So that, that always you know plays on my mind in terms of, you know, you do have responsibility? Just make sure that the impact is at least largely positive". (TP3, 3:28, ¶ 363 – 379)

Kay continues to be driven by the self-identity of being responsible for people and having a positive impact. This has actually strengthened in the meaning of her leader identity as she talks to cultivating a legacy and being able to choose the way to lead to leave this legacy. This 'newfound' agency in crafting her new leader identity leaves Kay feel weird, perhaps due to it being a new way to act with proactive agency around her leader identity.

The statement that Kay makes is significant in so far as she sees her impact as one that could be broader the higher one rises in the organisation, as long as the impact is at least largely positive. This is in stark contrast to her statements at time point 1 when she is terrified of the next level up, where she fears the potential negative impact of leadership. She acknowledges leaders have both negative and positive impacts. Her leader identity narrative has developed in that she claims that being higher or more senior can have a broader influence and a largely positive impact, and that would fulfil her.

Kay has developed her leader identity over the time period as it now has more salience in her identity network and is more aligned with her self-identity narrative. The past self-identity narrative remains a filter for her appraisal of triggers and in her leader identity response. However, Kay now views this as an obligation, a 'damn promise' that she has made and now can never retract from. Having only a positive impact and only succeeding is not an option for her as a leader.

The reality of being a leader in business is that sales target numbers are always going to be met, people are not always going to be selected and appointed to roles in your team, commission quotas are not always going to be achieved. However, when this is coupled with an increase in confidence and agency of the leader, this opens up possibilities for Kay. Kay sees that a leader can largely have a positive impact and the higher or more senior level that one is in an organisation, the greater this can be.

The sense of great responsibility is reinforced in her leader narrative as it is that she is living proof that success is possible. Her quest to not fail continues, and this becomes an obligation. She cannot not deliver on her 'damn promise, even now.

"I want the sense of legacy, um, I have this positive influence. It's something I wanna grow you know, internally and externally...but now I'm aware of it so I have to and now

it's a obligation..., I can't let people down. If that's, without necessarily saying being definitive. This is the way I wanna go but now it's a drag and you can't. Can't not deliver on your damn promise.” (TP3, 3:43, ¶ 426 – 437)

“That I'm also quite conscious, I mean, I grew up in township and, and um, you know, under circumstances that probably weren't ideal. Um, and, and I often meet like people from township still. And um, one of the things that I do want them to see that it's possible. It's possible to, to actually be something you know, rise above certain things that life has, has dealt you. So that's also something that I constantly think about you know.” (TP3, 3:26, ¶ 339 – 343)

“I'm a, I'm living proof that it is possible to, to still get the driver element, ... So I had to train myself. Um, to actually do it and I wasn't conscious of, that was what I was doing. ... I just knew that I had to do it. And then when people gave me their feedback and I thought now I really am doing it. Now I have to do it. Even now.” (TP3, 3:42, ¶ 399 – 417)

“Proud and scared. Ja, um, ja, really super proud. And it's, it's um, it's also scared around, am I doing it justice. Um. Can it be more? Um, it's a huge responsibility.” (TP3, 3:34, ¶ 500 - 508)

This bears testimony that for Kay her past self-identity narrative remains a filter for her narrative as a leader. The tone has changed in time point 3 as she refers to the ‘damn promise’ and ‘now I have to do it, even now’. She cannot fail and has to continue to prove to her family and others that ‘it’ is possible. Kay experiences tension in this driver that at time point 1 arose in fear to advance her leader identity and in time point 2 in diminishing her leader identity. But now she has a more salient more conscious sense of what being a leader is.

Kay is managing ‘the perfect storm’ and most challenging year in her career in which her leadership is being tested. She is being affirmed and has an emerging language for her leader identity which is distinct from her self-identity. She has found a closer synergistic tie between her leader identity and her self-identity in that she sees that being at a higher level you can have a greater impact, in ensuring this is a largely a positive impact.

This serves to liberate Kay to be more open to other options and to consider a future alternate leader identity. At this time point, and for the first time, Kay states that as a leader she may put per personal interests first. And be more open to actually looking at other opportunities.

“Um, that before I was quite closed off cos I was quite in the zone and saying this is, I need to do this very well. But what I've actually realized is, that as a leader you need, you need to lift your head and also sometimes put your interests first in order to grow.” (TP3, 3:20, ¶ 259 – 261)

“..after all of this I've actually realised that ... at the core of leadership there's people... Um, so, so the one thing that has become clear to me, is having articulated better the kinda leader I want to be ... And what I need to do to get there, has made me more open to actually looking at other opportunities.” (TP3, 3:18, ¶ 251 – 257)

Kay begins to utilise her agency to connect with others outside the company around leadership 'type of things'. She is looking externally and connecting around leadership possibilities. This is not enacted, however, but the intentions being set by Kay are more open to exploring alternate possibilities. Her leader identity has salience and she has shifted her leader identity narrative over this time period. In the alignment of self and leader identity she is open to putting her leader interests first, open to opportunities and open to engaging around her leadership.

“I just try and make sure that one does keep in touch with other leaders in different industries. And just get together for a cup of coffee. And sit around and just chat. Leadership type of type of things.” (TP3, 3:39, ¶ 104 – 112)

Kay references another person's story in relation to a management development programme but through association indicates there are other options for Kay too.

“She said from when they started the program, to when they ended. How many people had changed, either what they do, or had quit their jobs. To pursue something else had just surprised her. And she, and she, actually she said the course just made you think broader. So, sometimes people from across the world and doing things that you'd never thought of. Um, people questioned, well there's a lot more out there that I could be doing. Actually, I'm gonna make the brave decision and quit.” (TP3, 3:13, ¶ 207 – 221)

This statement mirrors how Kay in time point three was buoyed by a sense of possibility. Kay had appointed a new executive assistant and the appointment was going well. In this case change is an opportunity and in comparison, it's a lot better.

“It's, actually when you when you do lose someone, you think oh my word. How inconvenient but. It's not just... Everything is like opportunity. Because actually, if I compare. It's a lot better.” (TP3, 3:48, ¶23–32)

This is a big shift from timepoint one and two when Kay mentions the biggest challenge of losing a team member and the pain of not appointing a current team member as the replacement. She is terrified of change at timepoint one and now sees the possibility in it, for her, as a leader.

Kay is not clear on her aspirational leader identity or career ambitions and has not taken agency or enacted decisions yet. But Kay is more open to future options. She has shifted her leader identity narrative over the time period as it is more salient in her identity hierarchy. She continues to grapple with aligning with her past self-identity narrative as a driver and becoming more aware of this as a containment and as an obligation. This could diminish possibility as opposed to liberate possible options for her leader identity development as the mantra remains of overall having a positive impact as a result of one's role as a leader.

4.6. Discussion from Kay's findings on GET 1.4: Leader identity response

The GET for leader identity responses includes the PETs for identity work in response to trigger, diminish the threat and 'to not fail' as a mantra for Kay. The PETs are outlined each in turn below with reference to the data and source quotations from the interviews with Kay.

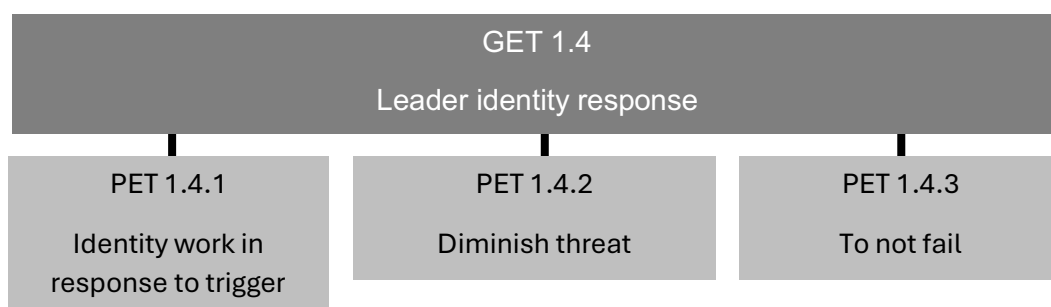


Figure 23

Group experiential theme for Kay: Leader identity response

4.6.1. PET 1.4.1: Identity work in response to trigger

Given the strong driver to have an overall positive impact Kay responds to leader identity triggers in clear ways to attempt to reduce the negative impact of the environment. Kay deduces for herself to focus on the controllables, only, to buffer her team and to filter out the noise, in other words to attempt to eliminate the threat of the external environment. This combined with her external locus of control and low agency means that her leader influence is diminished as she limits her focus at times of externalities pressuring her and her team.

“So I think it’s also being able to filter out noise and lead your team to focus on the road and not on the side, peripheral issues.” (TP2, 2:21, 89)

“You know you do need to be a buffer of sorts for your team” (TP2, 2:10, 25)

“I think though the thing is to focus on the controllables and I think that’s what I always tell my team.” (TP2, 2:3, Ref 13)

“Really, really do what you can control very, very well; you can’t control the economy, but you can control your interactions with what you do, so do that well and don’t let everything else distract you.” (TP2, 2:4, Ref 15)

“... as much as I say I’m very competitive and I hate failing, I’m also a realist.... And that’s why I say I’m going to do the things I can control ... very well. Because you know what, there are things I just can’t control and um, I am not going to change that – it is what it is.” (TP2, 2:32, Ref 211-217)

4.6.2. PET 1.4.2: Diminish threat

Kay reinforces her leader identity narrative in order to reduce or mitigate the negative impact of the adverse environment. She affirms her leader identity as one of having to have a positive impact and to show that it is possible to succeed, by limiting her focus on the controllables only. This leader identity continues to be driven by her self-identity narrative. Her self-identity dictates that she cannot fail, and as such attempts to limit the harmful impact of the environment, by focusing on the controllables. She diminishes the threat and her leader identity in the face of the leader identity trigger. The dynamic interplay between the self-identity and leader identity narratives provides a way forward for Kay to endure or seek assurance in her leader role through these difficult times.

Kay aligns her leader identity with her self-identity narrative (Bataille & Vough, 2022). The tie is strengthened between the leader identity and the self-identity, although the leader identity aligned with the self-identity. Kay formulates a leader identity narrative in response to the leader identity trigger that is aligned with her past leader self-identity narrative. Her leader identity narrative meaning and salience shifts to be in line with her past self-identity narrative.

During interview two, Kay also reflected on another potential leader identity trigger. There is a public spat around a CEO that is playing out in the media at the time. She formulates a similar response to this potential leader identity trigger, to not get distracted by the noise. She diminishes her leader identity by so doing.

“I acknowledge our CEO and our board are in a bit of (laughs) public spot. I think that’s no secret so.... Actually.... It makes no difference to me... So, I think it’s um... very easy to get distracted by noise. And right now, that’s what it is – it’s noise – because the reality of the situation is on a day-to-day basis, 99% of us he didn’t deal with. We must just go out and do stuff.” (TP2, 2:20, 81-87)

4.6.3. PET 1.4.3: To not fail

As stated, Kay views her professional performance through the lens of her personal self-identity. This lens also drives Kay to not want to fail. Her fear of failure is a prevalent driver for Kay’s leader identity.

“Failure I suppose. Failure. No one wants to be an unsuccessful leader! (laughs) I don’t want to be one of those – I have seen a few!” (No 1:43, Ref 48-49)

“Because we get driven by ‘this’ (gesture to office around room) – this unattainable ‘this’ – and results, and you’ve got to achieve this.” (No 1:56, Ref 87)

The drivers for Kay from her self-identity narrative are to prove success is possible to her family, and to not fail in her performance and as a leader. Not only is this a driver for Kay but the past self-identity narrative becomes an obligation. The driver becomes an obligation – she cannot fail.

In time point 3, interview 3, the narrative remains expressed in the same way and remains prevalent as a driver in leadership choices.

“That I’m also quite conscious, I mean, I grew up in township and, and um, you know, under circumstances that probably weren’t ideal. Um, and, and I often meet like people from (township) still. And um, one of the things that I do want them to see that it’s possible”. (TP3, 3:26 ¶ 339 – 343)

“It’s possible to, to actually be something you know, rise above certain things that life has, has dealt you. ... I’m a, I’m living proof that it is possible to, ... I just knew that I had to do it. And then when people gave me their feedback and I thought now I really am doing it. Now I have to do it. Even now.” (TP3, 3:42, ¶ 399 – 417)

The past self-identity narrative has become an obligation as a driver for Kay’s success and leader identity narrative. She cannot fail and has to prove to her family that it (success) is possible. The obligation to succeed and fear of failure become intertwined in her leader identity narrative.

Kay was approached to apply for a more senior role, but she declined to do so. She states the fear of failure as the primary reason.

“So that’s what I am battling with at the moment... Our MD for personal finance had a role on her EXCO and she asked me to apply, and I actually declined to apply, and I think the fear had consumed me. Now I am kicking myself, thinking you know, if I look back on my history, when you are put in a situation you live up to it! If you have the right support and you really have the right mindset and stuff! But I am still apprehensive.” (TP1, Ref 1:65, Ref 47)

Kay is seemingly not aware of how strong a hold the past self-identity narrative has on her current choices as a leader. Kay states that next time she will overcome her fear but the prevalence of her past self-identity narrative means that her fear of failure remains a key driver. She would rather move than stay if she did apply for the next senior role job opportunity and if it did not work out for her.

“So, I think my approach to the next opportunity would be very different. I won’t be driven by fear – which I think is what drove me and just shut it all down... it’s just about being more.... About embracing that opportunity and giving it a shot. If it doesn’t work then well, I won’t die, I will just move! Go somewhere else!” (TP1, No 1:45, Ref 57)

Fear of failure is a strong driver when considering her future leader identity and her comfort level in her current role as not failing remains prevalent. The pressure of being successful,

and not failing at a higher level is daunting to Kay, whereas her current success keeps her comfortable which in turn results in her and not progressing. The self-identity narrative of having to prove it is possible and to not fail filters her appraisal of opportunities or approaches. If she deems, she can fail or not succeed, she is fearful and reluctant to take up the change in leadership.

“So, I am comfortable with my leadership, but I am terrified of moving to the next level. And terrified for a few reasons: I mean the higher you go the more tough life gets, it is really difficult being a senior person, especially in a big organisation like this where there are lots of political things at play. ... there is a lot that you have to give of yourself and give up, and there is that pressure of being successful. I am successful now and I am doing a fairly good job and my reputation is intact. Ja, and go into a bigger leadership role where the scope is broader – that does scare me!” (TP1, No 1:36, Ref 45)

The fear of failure continues to drive Kay although she started to differentiate success from her self-identity as it emerged in time point 2, during interview 2. Various external events were taking place and she was not meeting targets. She realised that this does not reflect her capability, even though failure still felt threatening as it is intertwined with her sense of self. She simply cannot fail.

“Probably not a good motivator, but the fear of failure! That is a big driver for me – massive, massive! And I’m very competitive. So just not winning and not succeeding is a ... I’m really hard on myself on that, so sometimes when I am like ‘flip, I can’t do this’ I’m like ‘No, you can!’ Ja (laughs) You get up. So, I just do it. (TP2, 2:31, Ref 199-205)

“Otherwise, then what’s the point, um, but understanding that the result won’t always be what I want it to be and that I’ve got enough of a track record, a successful track record to not to let this small period suddenly make me feel like ugh, you know?” (TP2, 2:35, Ref 247)

“I mean the numbers aren’t where they need to be and that’s fine, but .. the thing that I realised was it’s about putting things in context. Um... it’s a tough time, but you know what, ... it doesn’t define the whole of me.” (TP2, 2:34, Ref 239-244)

4.7. Integrated discussion from Kay's findings – shifts over the time points

This figure is a summary of Kay's experience of leader identity development and the interplay with her self-identity narrative over the time period.

KAY OVERVIEW OF FINDINGS

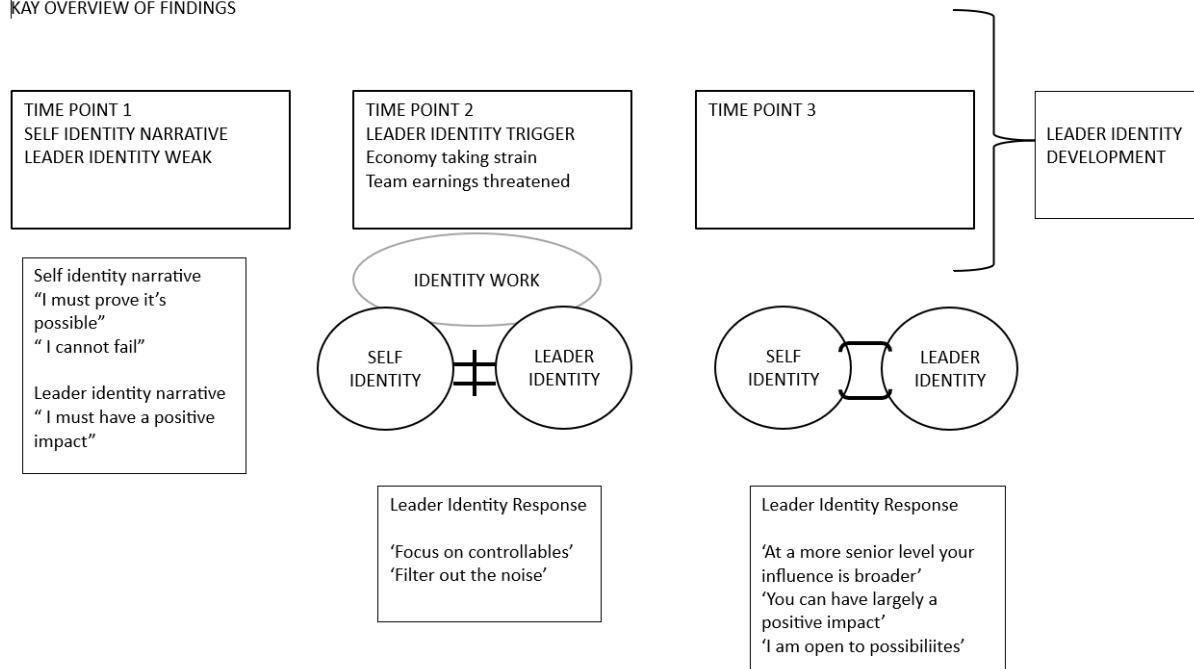


Figure 24

Kay's leader identity development over the three time points

Lexicon – tension \neq - alignment \square

This diagramme summarises what occurs at each time point, also showing the self-identity and leader identity interplay at Time Point 2 and Time Point 3.

The findings from time point 1 clearly reflect that Kay is driven by her past self-identity narrative – of needing to prove to her family that it is possible. As a result Kay believes that she cannot fail, she must succeed. These beliefs translate into her leader identity. She must have a positive impact, and according to this narrative, she cannot fail.

As a result of a fear of failure, Kay is comfortable with her status quo and finds change difficult. Kay has low agency and an external locus of control, needing external validation. She accepts responsibilities assigned to her and moves in her career only when approached to do so.

Coupled with this her leader identity is weak and has low salience. She is less conscious of herself as a leader, and dreads the responsibility of leading others, as the impact can be negative and the responsibility all consuming. Her motivation to lead is weak.

The dynamics of the interplay between her self-identity and leader identity play out over time point 2 as the contextual issues put pressure on her performance by not reaching her numbers and targets, and pressure on her team as their earnings through commissions are threatened.

Kay experiences the contextual pressures as a trigger to her leader identity, as her identity as a leader is brought to the fore and to question. She experiences identity work in the interplay between her self-identity and her leader identity. The diagramme shows this at Time point 2 as the self-identity in one circle in tension with the leader identity in a second circle.

Over this time point her leader identity is diminished, and the self-identity dominates in the interpersonal identity hierarchy. She experiences tension in her role as a leader because of the negative impact this could have on her and her team in these challenging economic times. She bears witness to the negative impact another leader has on another colleague and resolves in her leader identity response to only have a positive impact on her team. To do this she chooses in her response to the appraisal of the trigger to focus on the controllables, to buffer her team, to filter out the noise.

Her self-identity narrative has been the filter for her appraisal of the leader identity trigger. She believes she cannot fail and she has to have a positive impact on her team and she cannot fail, so she only focuses on the known areas and only on a limited focus on doing what they do and ensure that they are doing this well. In the inter identity network the self-identity is dominant, the leader identity weak albeit salient.

Kay experiences leader identity work in which she questions what sort of a leader she wants to be, what the impact is she wants, and builds a more nuanced narrative of seeing that leaders have both a negative and a positive impact on their people, and that they cannot only be compelled to have a positive impact. She has made some recent decisions in her team around appointments and has over this period been validated as a leader with colleagues on the management development programme and by her direct manager, hence realising that the results alone do not reflect her full self or her full capability. She could not control achieving lower sales numbers given the constraints of the economic environment, and states that this does not mean she is a failure, it does not define her full self or her capability or show she is.

She is beginning to distinguish her leader identity and what success means in this realm, in this identity, from her driver past self-identity narratives. She begins to see herself as discrete from her leader identity, and a shift in her leader identity narrative emerges. Her confidence and agency are bolstered and as such she becomes more open to possibility for herself. She sees that at a more senior level one can have a greater positive impact and she commits to leaving a legacy that is largely positive, and that she is open to exploring future opportunities, even if not with this company. As such her leader identity is gaining strength and salience in the interpersonal identity network and is aligned with the self-identity narrative, not subsumed by it. This is depicted in the diagramme at Time Point 3 as the two circles of self-identity and leader identity are aligned.

For Kay this represents a shift in her leader identity narrative and represents leader identity development over this full time period. Albeit that her leader identity is not yet strong or fully formed, nor has it been enacted, but this does not negate that it she has developed her leader identity over the period. Kay has grappled with her leader identity and the dynamic interplay between her leader identity and self-identity narrative informs this leader identity work. She is crafting a renewed leader identity narrative that is coherent with her self-identity, that is aligned with it, but also discrete and more salient. Kay is learning and acquiring a new language, a new narrative for her aspirational leader identity.

She sees that that a leader at a higher level can have a greater, more positive impact. She is open to new career opportunities and believes she will respond positively when she is approached for the next role. Kay has not shifted her self-identity; she has closer ties and more synergistic ties between herself and her aspirational leader identity. Kay has shifted her leader identity narrative and with this we see Kay has developed her leader identity over the time period.

4.8. Integrated discussion from Kay's findings – experience of the appraisal of leader identity triggers and the impact on leader identity development over time

In sum, Kay has appraised the potential leader identity triggers of the contextual pressures as the perfect storm as a leader identity trigger. This is due to the filter of the appraisal being through the past self-identity narrative of her having to prove it is possible to not fail, to have only a positive impact on others. Her past self-identity narrative has defined, even limited perhaps, her responses and appraisals of potential leader identity triggers. Her identity work was triggered in the dynamic interplay between the self-identity and leader identity in the intrapersonal identity network and hierarchy.

Kay works through this most challenging year for her leadership, and she now sees that as a leader she has both a positive and negative impact on her team, that as a more senior leader she can commit to a legacy of having a largely positive impact on her team, that this is possible. Further, she believes she is no longer defined by so-called failure and that she is more than reaching her numbers. Her leader identity in response to this identity work shifts and a different narrative emerges around her leader identity as being more discrete from her self-identity. Her leader identity has more salience and she finds alignment and coherence between this and her self-identity. Kay's leader identity has developed over the period.

Table 4

The factors of Kay's leader identity and self-identity

	Leader identity strength and salience	Self-identity strength and salience	Influences	Self-identity narrative	Leader identity tie with self-identity	Leader Identity Development
Kay	Weak	Strong past self-identity narrative	Low agency External locus of control	Self-identity narrative as a Constraint	Tension and Identity work and then Alignment over time	Leader identity gain strength and salience Leader Identity Narrative shift

This table also summarises the influences that impact how Kay appraises and responds to a potential leader identity trigger, and how her past self-identity narrative serves as a constraint in her leader identity development as she must find alignment within the confines of her past self-identity narrative. Her leader identity work is in the tension between her self-identity and

her leader identity. It is when her leader identity gains strengths and salience that she finds a new alignment in her shifted leader identity narrative. In this we see that although her leader identity remains weak, that Kay has developed her leader identity over the time period.

The phenomenon as experience by Kay is depicted in the following Figure 25.

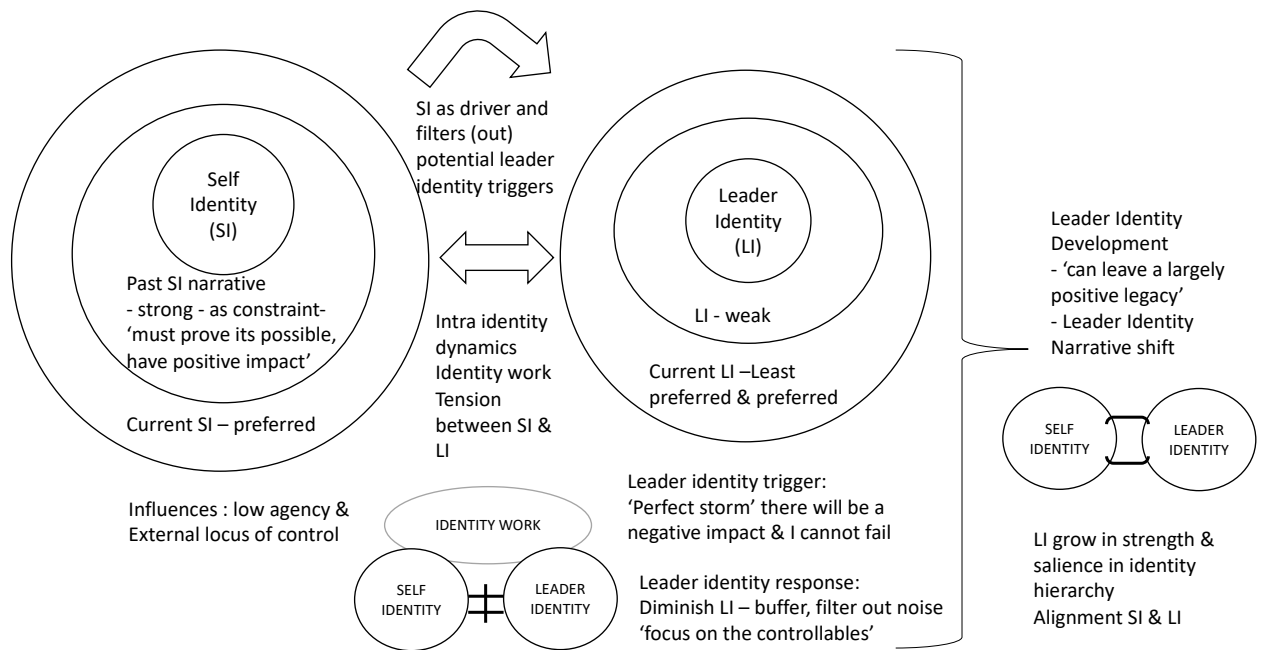


Figure 25

Kay's experience of the phenomenon of appraising potential identity triggers and impact on leader identity development over time.

In this figure the dynamics of the phenomenon in question are captured.

In the first circle the self-identity is layered by the past self-identity narrative which informs the preferred self-identity, which is to 'have a positive impact' and to 'prove it is possible', in Kay's case. Alongside this are the influences of low agency and external locus of control. The second circle on the right depicts the leader identity which is weak and there is a preferred LI, to 'have a positive impact' and least preferred leader identity, 'to be the cause of misery'. In between the SI and LI circles are the inter identity dynamics. The SI serves as a driver and filter to potential leader identity triggers. When the SI past narrative is triggered so the LI is triggered, as the SI remains dominant in the inter identity network.

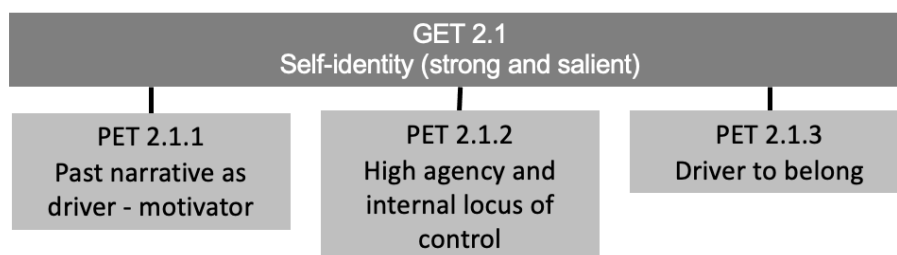
The 'perfect storm' of challenging environmental conditions is experienced by Kay as a leader identity trigger as it challenges that Kay can always have a positive impact and prove that it is possible to succeed. When there is tension between the SI and LI there is identity work. The leader identity response is to align with the SI, so Kay in this instance chooses to filter out the noise (that may cause misery) and to only 'focus on the controllables' (to prove it is possible, and to not fail).

During this period Kay does shift her leader identity narrative to see that she could have a largely positive impact and the strength and salience of her leader identity develops. Key then finds a renewed alignment between her SI and shifted LI narrative. So it can be concluded that Kay does develop her leader identity over the time period.

In the next section I outline the findings of Paul and pull these together in an integrative discussion and diagramme.

4.9. Paul: overview of group experiential themes

The figure provides the GETs for Paul over the time period: self-identity (strong and salient), specialist skills important for career advancement and differentiation, future leader aspirational goals clear, leader identity developing, and the tie between self and leader identity is synergistic. In the following sections I share the findings for each GET and an integrated discussion.



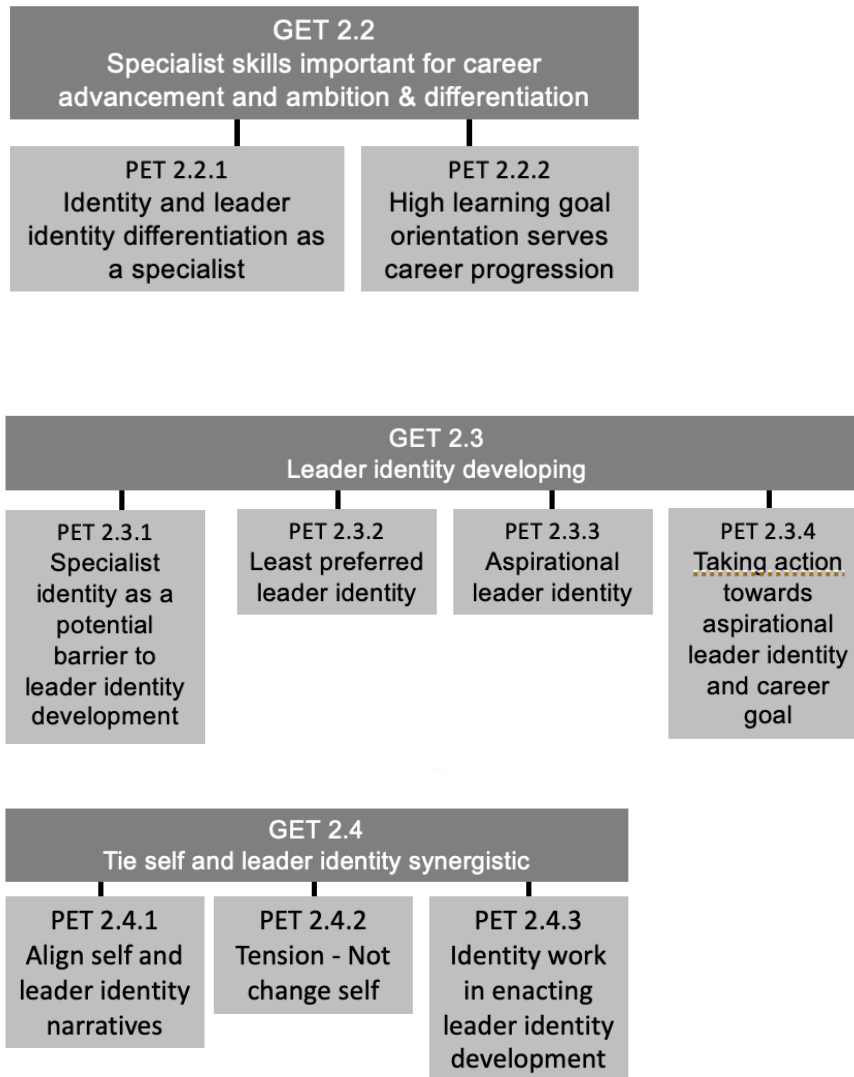


Figure 26

Group Experiential Themes Over the Time Period for Paul

4.10. Discussion from Paul's findings on GET 2.1: Self-identity strong and salient

From the get-go Paul presented himself as confident and a business focused professional. When I arrived for our first interview, Paul didn't hesitate to take me through to the MD's office to sit in for the interview. He said the MD did not mind Paul using his office when he was out. Paul spoke clearly with a strong voice about himself and his career.

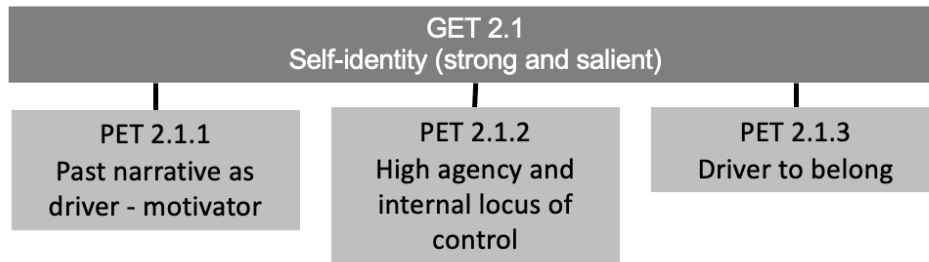


Figure 27

Group Experiential Theme for Paul: Self-identity Strong and Salient

4.10.1. PET 2.1.1. Past narrative as driver- motivator

Paul presented a clear narrative of his self-identity. This narrative is firmly rooted in his past experience which informs his response in a corporate setting.

“I always had a very entrepreneurial nature, and I found myself when I was younger (we were farmers, my father was a farmer) and we used to sell at a vegetable market, so I was very much in the business front – selling, trying to make deals for yourself, get people to buy your stuff!” (TP1, 4:16, ¶36)

His past experience also informs his sense of confidence, drive, determination, ambition, and a high self-agency. As such, Paul’s past self-identity narrative serves as a motivator to Paul:

“Well, I was very determined to succeed, so even before I took the job, they asked me at the interview ‘Where do you see yourself in three years’ and I said, ‘Well there is no reason I should not be in a team leader/supervisory type of position’. And they looked at me and said ‘Shoo, you’re quite ambitious!’ and I said ‘Well, if you’re not ambitious then what are you?’ To me (I was 19 at that time), how can a 19-year-old not be ambitious? I could have just stayed on the farm and carried on being a farmer earning like a small-scale farmer – a few 100 rand a day!” (TP1, 4:18, ¶42)

The strength and salience of Paul’s self-identity comes across in the way he talks about himself:

“So yes, I had a lot of arrogance about me, because you need to explain to me well, you can’t just tell me ‘It can’t be done’ – it’s not enough! ... I am also a little bit wiser now, so I have learnt some things that don’t work – and I have learnt through experience, even when I have been told ‘this won’t work’ – and I have gone ahead and tried it and failed it myself! So, I have done that.” (TP1, 4:24, ¶49)

He is aware that his confidence could have been interpreted as being arrogant, but reflecting back he regards his confidence as advantageous since it strengthened his ability to take risks and tackle challenges head on.

4.10.2. PET 2.1.2 High agency and internal locus of control

Paul has high agency and an internal locus of control. From an early age he drove his career and development out of a need to be self-sufficient and to be earning an income.

“I didn’t qualify. I went straight from high school. ..I had other financial constraints. At the time I was the eldest of three siblings, so my only option was to find employment. So, I left City B, came to City A looking for a job. I was lucky in that I had other family members living here, so I just moved in with them and lived with them for a while rent free – it was awesome – and then I got the job at the bank. I needed an opportunity, and I didn’t really care; it paid me an absolute pittance, but it was enough to pay a small portion to rent, pay travelling expenses, buy clothes so I had enough proper work clothes...” (TP1; 4:8, ¶ 24)

4.10.3. PET 2.1.3 Driver to belong

Belonging was a point of contention for Paul, and he recognises the significance of affirming his place of belonging and inclusion – also in relation to him not having a tertiary qualification:

“I’ve worked on major projects successfully, delivered them, and then in the conversation ‘oh you’ve done a great piece of work on this you know; you should come and work for me – what is your background?’ And then I say ‘no, I don’t have a qualification’ – so kind of what consulting actuary is going to employ you?! (laughs) They don’t say that, but you almost feel it! And so, it could just be in your head (laughs) Most of the time it probably is, but... And that’s what I’m talking about, that’s the level of inner confidence. Ja, so I think that’s important – for me personally. And I feel I belong, so that is definitely helping me do what I actually want to do.” (TP2, 5:32, ¶ 406 – 412)

“So definitely, you know sometimes people might come across confident: I may come across confident, to some people even pompous, but the truth is you’re not really – because you’re confident in the setting you’re in”. (TP2, 5:29, ¶ 380 – 388)

“... you get into a boardroom and you’re sitting with people who you think are very high profile in their pin stripe suits and fancy looking.... So, for me, for my personal head space, I mean definitely getting a degree has helped, because I do know I know it, and as much as you think it doesn’t make a difference, it really does; it just gives you that little bit of greater self-confidence. And a lot of people will say after a long time of knowing you ‘so what is your background?...and you know you say, ‘oh no, I have a matric’ and you know, suddenly you almost feel yourself drop in their eyes! (laughs)” (TP2, 5:31, ¶ 396 – 403)

There is a disjuncture between how Paul reflects himself from the inside, his personal self-identity narrative – this is of someone who is not confident and self-assured, but who is self-assured in his place at work as a technical specialist. He has an internal drive to keep proving he is reaching his potential, that he wants to strive for more, to learn more and to ultimately prove he belongs.

“And when you move up you don’t feel you belong. You may belong, but inherently you’re like ‘maybe this is above me’. And it is not ability, it’s your personal space... And I think for me that’s something I have had to overcome, and I think it has a lot to do with where I came from. I mean my father was a farmer, a small-scale farmer, they ran their own businesses, and I have never really had anyone working in the corporate world.... So, I am probably part of the first generation of ... to enter the formal corporate world.” (TP2, 5:30, ¶ 390 – 394)

During the second interview, Paul shared information about the strategy of the business and his appreciation for learning through being in the conversations. He also spoke about resourcing challenges and how he had identified this some time ago as a business risk. In sharing this, Paul positioned his view firmly with the executive committee, claiming his voice and affirming his belonging in this forum, which he acknowledges was a process of overcoming his inner confidence and mindset of being ‘lesser than’.

“Yes, I actually raised it again in our executive session, and I said, ‘I am now speaking to the truth’ and you know people don’t always like to portray the failures that exist in their environments, so they are almost like ‘No, no, we can manage, we are okay’. And I am like ‘No, we are actually not that okay’. We have challenges.... Because all you really want to know as a company is actually putting plans in place to resolve the challenges.” (TP2, 5:36, ¶ 456)

“[...] it is not like I had... a lot of support base within the family setting, that you could almost take learnings from ... I mean I know how to farm, ... and I know how to work

in a supermarket and run a supermarket..., but it's still not the same..." (TP2, 5:31, ¶396–403)

Paul is as much driven by his past self-identity narrative of the need to achieve more and more, that he does not want to reach a point where he says he did not live to his potential, and this is not it. Paul wants to be a part of a much more senior role within a 6–18-month period.

"I see... myself as part of that, but at a much more senior role. And um, that's my ambition and that is what I have communicated, well I haven't communicated it with anyone yet but... But I am going to start having more direct conversations, this is what my expectations are...I don't want to feel that I look at my career and feel that I had so much potential. I should never think that. I want to look back and say, 'I've lived my potential'. And if this is my potential then I need to accept it - but I don't accept this as my potential!

... and if I can't get it in this business well then, I have to look outside. But I do believe I will get it in this business, and I certainly get enough support. So, I mean I don't mean it's going to happen next month or next week. I am talking a 6-to-18-month period. I am not unrealistic, but I am also a practical individual, I am not demanding immediate revolution! (laughs) It's not going to be a coup; it's going to be a national transition! (laughs)" (TP2, 5:38, ¶476–498)

4.11. Discussion from Paul's findings on GET 2.2: Specialist skills important



Figure 28

Group Experiential Theme for Paul: Specialist Skills Important for Career Advancement and Ambition and Differentiation

The GET comprises two PETs which are outlined below.

4.11.1. PET 2.2.1 Identity and leader identity differentiation as a specialist

Specialist skills are important to Paul and his sense of himself as specialist is central to his story. Paul is good with numbers and was good at maths and found himself getting a job after finishing school with these skills that came naturally to him. He was not even sure of what the job was about but took it on without hesitation. He is not risk-averse and takes on new challenges with gusto and enthusiasm:

“The position was actually titled Actuarial Clerk. So, I didn’t know what that meant – ..., and I obviously had an affinity for numbers, I was fairly good at maths, I enjoyed it – and I went for the interview at Co D. They were having a major challenge, people weren’t passing the maths tests they were writing so I wrote the test, I passed the test, the HR guy interviewed me and then he said to me ‘Would you like to be interviewed by the manager today?’ So, I said ‘Well sure, if he is available – absolutely!’ The manager interviewed me and the next day they made me an offer.” (TP1, 4:13, ¶ 32)

Early on Paul sees that having specialist knowledge and skills serve him well in his career progression and his ability to differentiate himself. Coupled with his drive and determination to succeed, and his raw ambition, the objective of holding the knowledge base provided him with the opportunities for quick successive promotions early on in his career.

- Leader identity as specialist as differentiator

Paul stated that he had resignations and emphasised how hard it is to find a replacement due to the specific nature of the work; hence reinforcing his specialism and differentiating himself and his team:

“Unfortunately, I have had a couple of resignations in my team and that’s made it even more challenging.... The thing is because our business is quite specific in nature, it is not always easy to get direct replacements, and there is always a bit of a learning curve that people need to go through when they come in new.” (TP2, 5:1, ¶ 14 – 20)

Being a specialist serves as a differentiator as a leader for Paul. Paul is appointed to lead a team of technical specialists, a role he is comfortable in. As he moves between companies, so he continues being appointed to lead small teams of technical experts. His leader identity remains strong as the technical specialist:

“I went into a team leader role there. So, at Co C the role they offered me was in a much more specialist technical team so you were... is not very hard at all- it is quite a flat structure, everyone is in quite a senior position already.” (TP1, 4:27, ¶ 53)

“So, I went to a team leader role at Co E, looking after their pricing team. At the time they had one other pricing technician as they called him, but he came from a medical underwriting background. So, I very quickly realised that he didn’t fit the role, and I think they realised it, which is why they decided to employ someone like me who had much more technical mathematical statistical sort of understanding and background.” (TP1, 4:28, ¶ 55)

“[...] they decided to change the structure of the business and they felt I was better suited to a more technical role rather than looking after a strong operational team.” (TP1, 4:34, ¶ 75)

During the second interview Paul reflects on his experience of attending a strategic executive meeting, as he is experimenting with his leader identity in this forum, and although he wants to be a pure executive leadership function he does see once again that his technical acumen is what affords him the opportunity to be at the table and have a strong voice and contribution at the table. He found the engagement very valuable for himself and was able to take ideas away from it:

“[...] I think it got me thinking about a lot of stuff and the way I do it. So, so, so from my perspective it was very, very valuable.” (TP2, 5:20, ¶ 208 – 216)

Upon reflection he also recognised he contributed a lot to the conversations during this executive meeting. He stated that he contributed substantially and linked this to his detailed operational understanding. He regards this as his biggest strength in combination with knowing the most detail, having tacit knowledge due to being in the organisation since the start. He differentiates himself based on this and feels that no education, no university can give you. Paul has strengthened his identity around his operational understanding and is using his tenure and role in the business to differentiate his technical strength:

“I think you know I gave obviously a substantial level of contribution, ..., so I have much more thorough detailed operational understanding of it than some of the executives. I mean they have a good understanding but not into the detail – that is probably my biggest strength is that I know it because I basically have started the business.... Knowledge, insight, insight into the business itself and um institutional knowledge that you actually can’t replicate; no education, no university, nothing will give that to you. That is just engrained because you’ve grown up in the system. Well, that’s my view,

(laughs) because look I definitely engaged to my fair level in the conversations.” (TP2, 5:20, ¶ 208 – 216)

4.11.2. PET 2.2.2 High learning goal orientation serves career progression

One of the defining characteristics of Paul is his high learning goal orientation. He thrives on learning, he pushes for it, asks for it, he revels in it. His appetite for learning seems insatiable although he has clarity around what it is he wants to learn, and his objectives for learning are clear. Acquiring new skills and knowledge has served Paul in his job success, career progression and to differentiate him in the businesses he works in.

“[...] the experience was fantastic; I learnt an immense amount in those fourteen months there. Mainly because I was sort of thrown into the deep end and swim or drown! And given my personality, it actually suited me. I revelled in it because the other guy there, you know they only sort of give you what they think you can handle, and I always wanted more and more and more.” (TP1, 4:9, ¶ 26)

Paul did not have a formal qualification as there was not sufficient funds to attend a tertiary institution. Ironically, it is partly the lack of having a formal qualification that becomes a driver for continuous learning for Paul. He experiences the lack as a driver to continuously fill, and he would not let that deter him or be a reason to not progress:

“I have always been like that, ... I was very determined to succeed, and obviously knowing that you don't have academic qualification and you haven't been able to go to university, was always in the back of my mind and I had a determination that that itself wouldn't be a reason that I would not progress!” (TP1, 4:11, ¶ 28)

Paul stated that he has career ambitions and that he does set clear goals and has clear expectations for promotion. The formula has worked for Paul to date, a clear goal to learn a lot, pushing to gain insight and knowledge, beyond his job boundaries, and differentiating himself and his professional identity this way. This boosted his confidence to express his career goals and tight timeframes.

His professional identity of technical and business acumen (business contribution) served him to be known and to support his career progression. His working identity aligns with his self-identity of being entrepreneurial, self-driven, confident, and on a quest to develop

continuously. They are mutually reinforcing. The self-identity narrative drives the working identity.

“So, when I started, my job was to do quotes. But I didn’t see it as that: my job was to do the quote and then I wanted to know what happened with the ... So, I was interacting a lot with our salespeople as well. It was not part of my job but because I liked it... So, I actually found that I was learning a significant amount from that, because I was getting a lot of insight into how the market operated.. I had a determination to be successful. I started at CoD and I was very determined to say that within three years I should be at a team leader level”. (TP1, 4:17, ¶ 38-40)

“So, it worked very well for me. So basically, what happened was that within three years I was promoted to a team leader – I actually had two promotions in one year, which is quite interesting ... So, I said ‘I told you!’ – it was just a bit of a joke.” (TP1, 4:21, ¶ 46)

“I never had a lot of formal leadership training or acumen; I literally got in, proved myself, worked hard and moved up the ladder. The management liked me, and they promoted me. And ‘Okay, you can be the team leader’. ‘Okay, great! I’ll be the team leader!’ And in my early days I had already set the standard based on what I was achieving. So, I felt that if I had the ambition to do this” (TP1, 4:37, ¶ 83– 85)

“I literally said ‘this is how I think it would be done’. They made me the offer the next day. And I literally served 24-hour notice at CoC.” (TP1, 4:26, ¶ 51)

For Paul, skills progression and technical acumen underpins his career progression.

Ambition and quest for learning

Paul is ambitious and has clarity around his future aspirational goals. His drive and arrogance, self-confidence and determination led him to believe he would be promoted and progress in his career. When a firm or situation did not serve him, he left the company. His sense of agency was high as was his internal locus of control. He made choices to move jobs to progress in his career. He took new opportunities that he believed would serve his career ambitions. He was confident in his technical abilities and was loving the learning and application of his skills, and career progression:

“I wanted more. So, it was never a question of why do youit was like ‘why not?’ So obviously I didn’t expect to just get promoted, I came there and said ‘well actually, my objective is to hold the knowledge base’ so that I know this position will come up, and

when it comes up there should only be one option. And in the early days it worked very well. And when I was in the bank, I got two promotions in the fourteen months before I left; when I moved to Co D, after six months I got my first promotion.” (TP1, 4:19, ¶ 44)

“But the thing is, it was not about the title, it was about am I getting the exposure and the knowledge. And Co D was probably the best learning environment I have ever worked with. What I learnt in that organisation has really stood me in very, very high regard in all of the other organisations ...And I had a very big focus on learning: I had a management who fortunately were willing to tolerate my constant questioning, and I did – I literally would walk into their offices 5,6,7 or 8 times a day to ask questions – and I didn’t just take the answer they gave to me; if I didn’t like the answer I would challenge the answer, and they put up with it!” (TP1, 4:23, ¶ 47)

“I am thinking I don’t know what you’re complaining about, my salary just doubled when I started here! ... because I enjoyed what I did the work didn’t feel like work – it just felt like ‘well this is fun’ - I loved doing it!” (TP1, 4:20, ¶ 44)

Paul makes career changes when he deems that company is not affording him a chance to develop and in the same vein not affording him an opportunity to differentiate himself, and mostly denying him an opportunity to move up the corporate ladder.

“There were a couple of reasons I left Co C: firstly, Co C didn’t really have a plan for us; ... I literally sat there for an entire month doing nothing. And it was not me. I didn’t want to be a number in an organisation, I wanted to be making a difference, I wanted to feel I could contribute.” (TP1, 4:25, ¶ 51)

“I did not like the culture of the business; ... I was also a very obstinate individual, if I saw something wrong, I told them...– whether you were the manager or the head of the business. ... But people didn’t appreciate that, in that organisation; they felt I was too outspoken, and it started to hinder my own growth in the company... I wanted more than just money, I wanted to feel a sense of self-achievement. And I wanted the personal growth, I wanted to be moving up the corporate ladder. And when they couldn’t give me proper reasons why they wouldn’t move me then I started feeling actually maybe this business is using me for the skill I have but are not interested in developing me as a person.” (TP1, 4:30, ¶ 59)

“And I am like ‘guys, I have been doing this a long time, I know what I am doing’. ... I have been telling you this for like 18 months, by my determination and willingness to not fail, and now even my working 15 hours a day is no longer helping. I can’t do it anymore’. And honestly the money didn’t make a difference.” (TP1, 4:32, ¶61)

His next move from this company was based on whether he could learn from his manager and if the company supports ambition:

“So, what I was more interested in was more my personal growth. And when I had the interview at CoG ..., so I phoned some of my friends who had worked here – what is the culture, what do they do, what is their ambition – and what I liked is what they sold to me. And I liked the manager. And I thought this is someone who I can learn from. So I took the job. (TP1, 4:33, ¶65–69)

“So this is the kind of company that has always encouraged ...a very, very family knit, very tight knit unit; you have a problem, you need help, there is no ‘this is your responsibility, you deal with it’. If you needed help, because it was a small company, everybody got in and found a way to get it done kind of thing. And it allowed me to also learn a lot about the rest of the business. So that actually was a fantastic learning earlier on. And then obviously with the changes I had a bigger team, six or seven people, one guy was in his 60s, another in his 40s, two in their 30s and a few in their very early 20s. So that itself actually gives you such a great learning experience, because you deal with them, interact with them, so differently.” (TP1, 4:41, ¶97–99)

As the business grows so Paul sees this as a learning opportunity and as his team grows so he also develops his leadership capacities.

4.12. Discussion from Paul’s findings on GET 2.3: Leader identity developing

This GET comprises four PETs which are outlined below

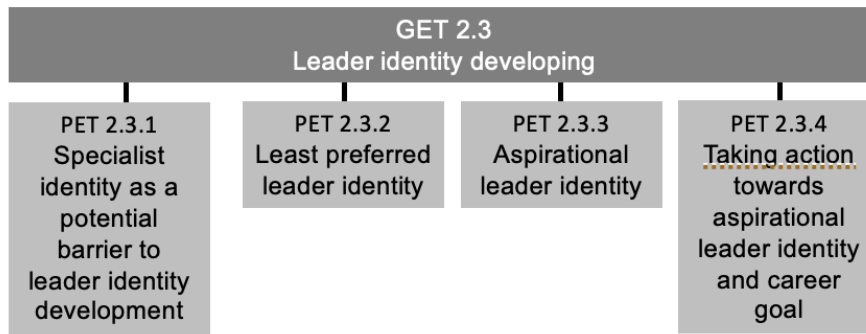


Figure 29

Group Experiential Theme for Paul: Leader Identity Developing

4.12.1. PET 2.3.1 Specialist identity as a potential barrier to leader identity development

Paul sees his technical acumen as superseding his role and identity as a leader. Whilst his technical acumen is his biggest strength he also has the realisation that it holds back his progression as a leader. His leader identity narrative demonstrates how is he stuck in his reputation on delivering operational needs of the business. He draws on his need to develop himself as a leader but remains focused on the technical aspects of the job to get things sorted out, hence feeling in a holding pattern. Paul starts to see that this specialist knowledge is a cause for holding him back as the company resists as they need his strong technical acumen.

“When I got to Co E I was a team leader, but I was so stuck in delivering the operational needs of that business, by putting the processes in place, the structures – because they had nothing!... And then when I reached a point where I said, ‘I need to develop myself’ and I started trying to do the leadership I found time was always a problem ...so I was very much absorbed in the technical aspects of the job and never really having the kind of exposure needed to develop as a leader. When I started to say that I wanted this, is when I started getting a lot of resistance at that company as well. Because my biggest strength up to that point was my very strong technical acumen, and ability to fix problems.” (TP1, 4:39, ¶89)

“So, if you had a problem, I was the guy to come to. So, I think as a true leader, my real development has started here at Co G. I have also been here ten years, so you get a lot of time to sort of establish yourself and almost create a reputation or image.” (TP1, 4:40, ¶91)

“Look, obviously [...] I am quite focused on really developing my leadership and defining what my leadership style is going to be. The one challenge I have— not that it is sort of impossible to develop that within this organisation – I think sometimes an organisation brandishes people in a very specific mould, they brand you in a very specific mould. And when you are changing that mould, it is not always an easy thing to do. ... it is easier for the newer people because they see what I look like, they are not seeing the older version of you. And obviously fundamentally I am not a different person, it is just how I am approaching situations that has changed.” (TP1, 4:52, ¶ 129)

Paul is intending to shift his leader behaviour and leader identity away from being heavy handed, away from a technical specialist operational role, he again sees that the business has an image of him, has a way of viewing him, that may hold him back:

Paul does not see his self-identity changing but notices the negative response to his intentional development of his leader identity.

4.12.2. PET 2.3.2 Least preferred leader identity

He does have this tendency of overplaying his confidence and self – assertion and is aware that others may view this as aggressive, pushy, or arrogant behaviour. So, he holds onto the part of himself that is driven however sees that being a dictator as a leader does not always serve the best outcome or results. There is a dynamic interplay between the preferred self-identity and the least preferred leader identity. This dynamic interplay is experienced as identity work for Paul throughout the time period.

“I have struggled with meetings that are not moving forward! I really struggle ... I am saying ‘guys, I only have an hour and we have made no decision’..... I think people think this individual is an aggressive.... And I am, my natural style, I am an aggressive... and when I say aggressive, I don’t mean aggressive as in ‘I am going to beat you up’, some people will call it pushy, some will call it arrogant, but I have always been a person who is very driven. ... And obviously when you get into leadership it is about actually getting all the parts to work together, to put it together – rather than one just dictating what needs to happen.” (TP1, 4:53, ¶ 129–131)

Whereas Paul expresses a strong self-identity heavily informed and driven by his past self-identity narrative, he does not see his leader identity as having been strong. He struggled initially dealing with a poorer performer in his team and did see that having a heavy-handed

approach was not always the best approach. He saw he projected his worldview onto this team member and also saw that his approach did not necessarily work:

“And that was how I was, so I was probably a very hard leader/manager; I wouldn’t call myself a leader, I don’t believe I was a leader at the time. I was a messenger, and I had high expectations and I was ruthless. Simple as that. I was fortunate enough that I had a lot of good people, so I didn’t need to be ruthless with them; ... And it is only when you get the wannabe person that comes into the team that you realise actually that this is not the proper way.

And that did happen. One of the individuals left, we employed another person and then we were a lot weaker, a lot, significantly weaker. ... and that’s when I think you really get tested as a manager firstly, and as a leader – is when you are having to actually deal with somebody where you need to lift. And that is when I started to really struggle a bit and it took me a while to start realising that actually the best approach is not always the heavy-handed approach. I think the reason I had the heavy-handed approach in the beginning was I could not comprehend why a young individual could be so willing to give up the great future that he could possibly have!” (TP1, 4:38, ¶ 87)

4.12.3. PET 2.3.3 Aspirational leader identity

Part of Pauls’ aspirational leader identity is to be seen to guide and develop people. He takes some pride in sharing an example of not giving up on a poor performer in his team. He still sees skills acquisition as key to work success. He is able to see and experience how he can be the guide. This narrative around his leadership emerges and gains form over this time period.

“And the first two years here I really struggled with him, and we were probably on the brink of firing him. Well, I didn’t want to do it, I was saying ‘No, we can improve him. I know he’s a smart guy, he’s always been smart, he has just been lazy’. And then I got told ‘You need to get rid of the guy, and thank God, I am grateful that I did not do that. Today he is the quotes manager. So, he turned around substantially!” (TP1,4:43, ¶ 107 – 109)

“I stopped being his line manager, our relationship actually got so much better, because I went from being his operational manager to actually being a leader – not a mentor, I don’t like that word, it gets thrown around too frequently – but I would like to say guide. So, I was then able to impart to him knowledge to help him develop, train him and then

without fear of the consequences! ... But I also then found that actually I was taking a much more positive approach to him. And the positive approach with him did wonders because all he really wanted was positive affirmation, he didn't like being told that he has done a shit job; he gets really demotivated by it.” (TP1, 4:44, ¶ 111)

“And I also quite enjoy the influential leadership role. ... what I find is more and more a lot of people come to me, asking for viewpoints, opinions – and sometimes it's strange – I never thought I would be the kind of person who someone would come with their problems to. I actually quite enjoy doing that, I enjoy offering some guidance if I can. And that's actually why I decided actually that this makes me feel like I am making a difference. And if you look back at everything, I have said to you, the one thing I have always wanted was that I wanted the feedback 'I am making a difference'.” (TP1, 4:48, ¶ 115)

Paul is developing his narrative around being an aspirational leader identity of being a guide, a leader who makes a difference, who is influential. He has committed to developing himself as a leader and is firm in his career ambition of being on the executive as a fully-fledged member.

Paul reflected on his next career move during interview one and stated that his current company has a relatively flat structure which means there are fewer promotion opportunities, particularly given that he has his eye on the executive committee which has few posts to start with.

“And I am not saying it is not possible to achieve it here, I certainly think a lot of people have seen the change in me and they recognise it – a lot of people have said that to me. But also, in a smaller organisation the opportunity to get to that point also is relatively limited; this business is not going to appoint 30 executives. You know what I am trying to say? There are five executives. So, I am not quite sure how to explain it. So, for me right now my immediate focus is really a lot of self-development.” (TP1, 4:54, ¶ 133 – 135)

4.12.4. PET 2.3.4 Taking action towards aspirational leader identity and career goal

Paul has a clear learning goal in his leader identity with the aim of this serving his next career ambition, that is, to be appointed to the executive committee. He is beginning to craft this aspirational leader identity and in a way that would serve him as an executive.

During interview one Paul mentions nonchalantly that he has now completed his degree. This does not stop his drive to learn. He has seen the gap in his leadership style being seen as autocratic, heavy handed and has taken on the challenge to develop his leadership. He is forming his aspirational future leader identity, and references loosely the need to develop more human aspects of leadership. He cites this as a reason for going on the management development programme and the reason for being so fully vested in the programme – he sees these leadership skills as key to his next career move. He has technical acumen but acknowledges he has a weaker leader identity and leadership relational capacity.

“Obviously in between all of that I started studying again, I went to University A, finished my degree – finished last year actually. And that is actually why I am on the MDP right now is because obviously my focus is really trying to develop the more human aspects of your leadership style.” (TP1, 4:47, ¶ 113– 115)

“So yes, and it is always a big challenge. And like I said, this is why I am also on this MDP. I think the first MDP program ..., was the first time I have ever been onto any course or program where I literally did not switch my computer on, I did not take any phone calls, I did nothing. And that was an active decision; I literally said, ‘I am putting this computer in my boot, and it will not be touched for the duration of this course’. And I didn’t touch it.” (TP1, 4:51, ¶ 125)

Paul has shown signs of wanting to shift his leader identity narrative to be more people-focused in his leadership style. Paul shares he is experiencing a shift in his leader identity away from operational management to pure leadership:

“Yes, yes. So, I think I am at a point now, the last two or three years, well maybe the last two years at least, is where I am really seeing a substantial transition in my own personal self from operational management to pure leadership.” (TP1, 4:46, ¶ 119)

Paul is also experiencing some tension in releasing his operational role and technical specialist identity to function more on a strategic level. He even changes his language to talk in second person as a way of staving off the personal challenge. Paul is intentional in wanting to shift his leader identity narrative to be more people focused, more strategic and to let go of operational involvement, and being the go-to person to resolve technical issues. However, the identity work comes in as he recognises that the technical acumen and specialist knowledge is the very thing which has served his career progression and distinguished him in a business.

He has been sure to be one step ahead of anyone else in the room – to know more than anyone in the room.

The dynamic interplay between his past self-identity narrative as a driver, to succeed, his leader identity as a successful technical specialist and his future aspirational leader identity as a human centred leader are playing out. There is identity work within the intrapersonal identity network between the past self-identity, the aspirational leader identity, the preferred self-identity and preferred leader identity.

“Well look I think obviously my role changes as well, so the thing is your role reduces and becomes less operationally involved and you are more expected to function on a strategic level: it is never easy for someone sitting in a senior management position or leadership to let go of the operational issues, because let’s face facts, what has made you successful is probably that. And for me as well, what has allowed me to go through the corporate ladder, I mean it has really been my very strong technical acumen. I have always made sure I have been one step ahead of anyone else in that room. So, it doesn’t matter how smart people are, and it has nothing to do with intelligence or intellect; I always made sure that if I am going to a room with a group of people, I need to make sure that I have thorough insight into anything that is being discussed in that room.” (TP1, 4:50, ¶ 123)

Paul shares he has to dig deep to enact his shift away from being heavy-handed too. Interestingly as a parent Paul also learns to shift from being too heavy handed. Paul also acknowledges it has taken him time to adjust to belonging in the corporate world. His upbringing instilled certain beliefs and patterns which were hard to shift. This theme of corporate identification and belonging continue as a theme for Paul.

An event Paul shared which has triggered his leader identity work is that he was invited to and participated in an executive committee strategy meeting. He witnessed disagreements and saw rigorous engagement, but with the committee coming out being on the same page.

“[...], I was invited to that EXCO strat meeting... Which you know there’s interesting dynamics, I mean you see it in all levels of management, you always have um disputes, disagreements.... overall it’s quite interesting to see that because you see quite a factitious engagement and I’m thinking ‘Oh God, why me?!’ (laughter) ‘Why am I here?!’ But um ultimately the strength of any good business is how you come out of that... But yesterday, that engagement I think for the first time in quite a while, I felt actually that finally people are actually on the same page.” (TP2, 5:18, ¶ 184– 196)

During the second interview Paul reflects on his presence at the strategic executive meeting. Paul is relating his grapple with acting on his intention and resisting resorting to his lesser self.

“Look, I think um... obviously I, I don’t like to completely judge my self-improvement in that setting, because this is people that are probably more senior to [me]. So sometimes you might find that by default you are less your normal self because you are sitting with people who are sitting in more senior positions. But I definitely think that I’ve definitely learned when to... or I am definitely practising when to actually make a contribution and when to actually just sit back and understand what’s going on”. (TP2, 5:19, ¶ 200 – 206)

Paul also reflected on how he has become more comfortable in the strategy sessions as he has a stronger belief in the value of his contribution (and his place with the executive team): His leader identity is emerging as an executive who belongs.

“So, it’s like the third time I’ve been invited to the strat session, um so ultimately I think I’ve always been a significant cog in the execution of that strategy, because of the role I fill... Look for me I think from a personal interaction perspective I think the first time was a little... I wouldn’t say weird, but I felt a little bit out of place. So, while I did contribute and I made certain comments, it was more my own personal brashness, that sort of comments come from, it’s like (laughter) because they going to say, ‘why did they invite this guy?!’ Rather than saying ‘well actually I believe in this’. I have always had very strong personal self-beliefs, um, and also sometimes I mean I couldn’t quite figure, wasn’t quite sure ‘why am I here?’ Whereas by the second one or yesterday’s one I’m obviously much more comfortable, I believe I have a valuable contribution to make: (TP2, 5:21, ¶ 222 – 234)

4.13. Discussion from Paul’s findings on GET 2.4: Tie self and leader identity synergistic

This GET comprises three PETs which are outlined below

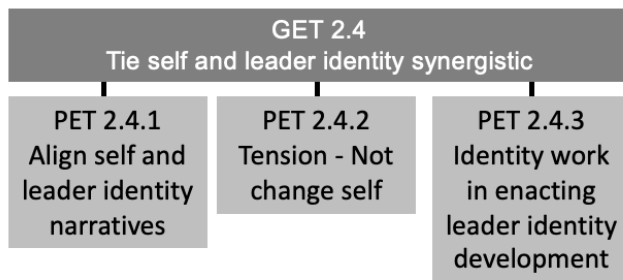


Figure 30

Group Experiential Theme for Paul: Tie Self and Leader Identity Synergistic

4.13.1. PET 2.4.1 Align self and leader identity narratives

There is an interesting tension in the narrative that Paul shares. On the one hand is his intentionality in shifting his leader identity away from being heavy handed, away from operational, yet he states he is not changing who he is as a person. Also, he says if you know him you know him to be the person who cares and guides. It seems like he has revealed his preferred self-identity to those who know him well, otherwise he has a different leader identity which he reveals at work; that of the technical specialist. Now the shift is coming as he becomes more holistic people can see more of the person he actually is. The tie between the self-identity and the leader identity is becoming more aligned and synchronous.

“And as much as yes, I have had the leadership influence over people over a number of years now, so I have always had influence over people because I had a lot of people who respected my opinion, but they respected my opinion because of my strong technical acumen; they may not have respected me as an individual. ... Those that didn’t know me, or didn’t know me as a person, respected me for my technical acumen. But now I find that I am probably getting, in my opinion anyway, a lot more holistic... or people can see more the person I actually am.” (TP1, 4:49, ¶ 121)

There is a dynamic interplay between the intra-identities and in the hierarchy particularly between the self-identity and the leader identity: preferred and least preferred, current technical and operational leader identity and aspirational guide and human centred influential leader. Paul is grappling with holding these multiple identities simultaneously, as there are tensions between them. Paul has an aspirational leader identity whilst his current identity as a specialist remains strong and salient. The aspirational leader identity narrative is becoming clearer, more intentional, and more closely aligned with a preferred self-identity. This leader identity is developing.

He is intent on developing his leadership and leadership style and to move away from his older version - his older identity of himself.

“Look, obviously [...] I am quite focused on really developing my leadership and defining what my leadership style is going to be.” (TP1, 4:52, ¶129)

4.13.2. PET 2.4.2 Tension – not change self

Paul also distinguishes that he wants to shift his leader identity, but he does not want to be a different person. In other words, he holds the same self-identity but wants to shift his leader identity. There is a dynamic interplay in the hierarchy of intrapersonal identities and there is a shift in the meaning and strength of the leader identity.

“The last year I sat down and said, ‘well I want to take the next step in my journey so I need something to help me here; I need some sort of method to refine almost’. And I wouldn’t say ... ‘change’ is the wrong word, I don’t believe you can really change, but it is to more evolve, and actually improve those rough edges or tone them down.” (TP2,5:7,76-84)

“And obviously fundamentally I am not a different person, it is just how I am approaching situations that has changed.” (TP1, 4:52, ¶129)

“Like I said to myself, don’t be something that is not inherently you, let’s work to the best you, and let’s improve the negative or the bad you. I’m saying well I will do the same thing as well, try and focus on my strengths and use that, and polish the weaknesses later!” (TP2, 5:25, ¶328 – 332)

4.13.3. PET 2.4.3 Identity work in enacting leader identity development

Paul has gone beyond setting intentions and has demonstrated his enactment of the leader behaviour shifts and shares examples of his leading his team and a work colleague as a guide, stepping away from doing the operational work, into being a more influential leader, even if it is not easy at times. He finds a way of balancing his guidance and influence as a leader, with using his technical expertise, and stepping out the operational detail.

“And the normal me would just do that, you know, I don’t have time to speak to people and tell them how to do it. Whereas the me now says ‘I am not doing this, I am going to give it to... and then you tell me how you think we should do it, right? And then you

come back and then we will review what you've done'. And I also said 'guys, I'm going to back your decisions, you come and motivate your decision: whether I agree with it or not is inconsequential' And I've done that, I've done that!" (TP2, 5:26, 334-349)

"Sometimes they have come back and said okay no, they think they will do this rather. And I think 'Thank God' – (laughs) because it's not easy, it's not easy for someone like me. I am by nature ... I like to think of myself as not a controlling person, but I am!" (TP2, 5:26, 334-349)

"And I say 'you know what, I think you speak to that guy further down the line, he is actually the best person who is going to be able to help you with..., it is just a matter of time that they learn to respect that person's ability and know that that person actually does have competence. And we have had a lot of that in this business, and a lot of it has changed...I mean there are some things where guys don't phone me anymore. I never speak to them" (TP2, 5:27, 350-366)

"And they have, they have! There's no problem, and they're getting better at it. (laughs) And the good thing was when I came back from the course I also then said, 'well actually guys, this is going to start being the new norm". (TP2, 5:10, 108-110)

"Some of it has been very positive, the guys saying, 'I do see you are willing to let go more, allow people to grow, allow them to shine actually.' ...I have done that, and I think it has worked, it will give them confidence. Because it is really about that, they need to have the confidence so they know what they are talking about." (TP3, 6:24, 132-136)

"And they are doing it. I mean some of the guys have been here ten years and I think in the last 18 months or a year it is the first time I have actually seen them actually willing to make those tough calls. And it is showing, I mean they are getting recognition" (TP3, 6:25, 140)

"So I suppose like I said in the beginning, I want to be quite an influential leader, a leader who makes the difference in lives, rather than just their work outcomes... you want people to see you as someone who they can trust and have faith ... this person would help me see the direction" (TP3, 6:35, 186-188)

Paul is proud of the experience he has in developing people in his team and demonstrates how he is aware how he is even more alert to this identity currently,

“I don’t know how to describe it, I am extremely proud of him, ... at the time I tried to get him up ... he was stuck, but I have always believed in his work ability. ... I mean last year when I said to him ‘I want you to do this course, I believe in you’ ... And he was a little reluctant but I think once he started getting into it – because people are always reluctant to expose themselves and almost get outshone or shown up to be not as confident as they may feel they are ... So I mean for him it was very significant, where he is promoted now .. and we now do our salary increases and I mean he was ecstatic! The look on his face!” (TP3, 6:33, 178)

“And now obviously we are bringing the other individual, the trainee from finance team, and I wouldn’t like to call him one of my projects... but...it is not why I am doing it, but yes, I like to see them succeed!” (TP3, 6:34, 182)

Paul has laid his cards on the table with his MD and expressed his career aspirations, which align with his intentional shift in leader identity. He is in response to the leader identity work enacting on his aspirational leader identity. Paul has agency and determination and has been active in progressing his career development.

“And he wasn’t completely against the idea, so he basically said absolutely I think I have got the potential so that is a good grounding point. Obviously you have to work on certain aspects, largely letting go of the operational role” (TP3, 6:15, 90-92)

His aspirational leader identity and career goal has been validated reinforcing his journey. His leader identity development has continued throughout this time period and he has enacted these shifts. It remains to be seen what choices Paul will make if his career aspirations are not met in this company.

4.14. Integrated discussion from Paul’s findings – shifts over the time points

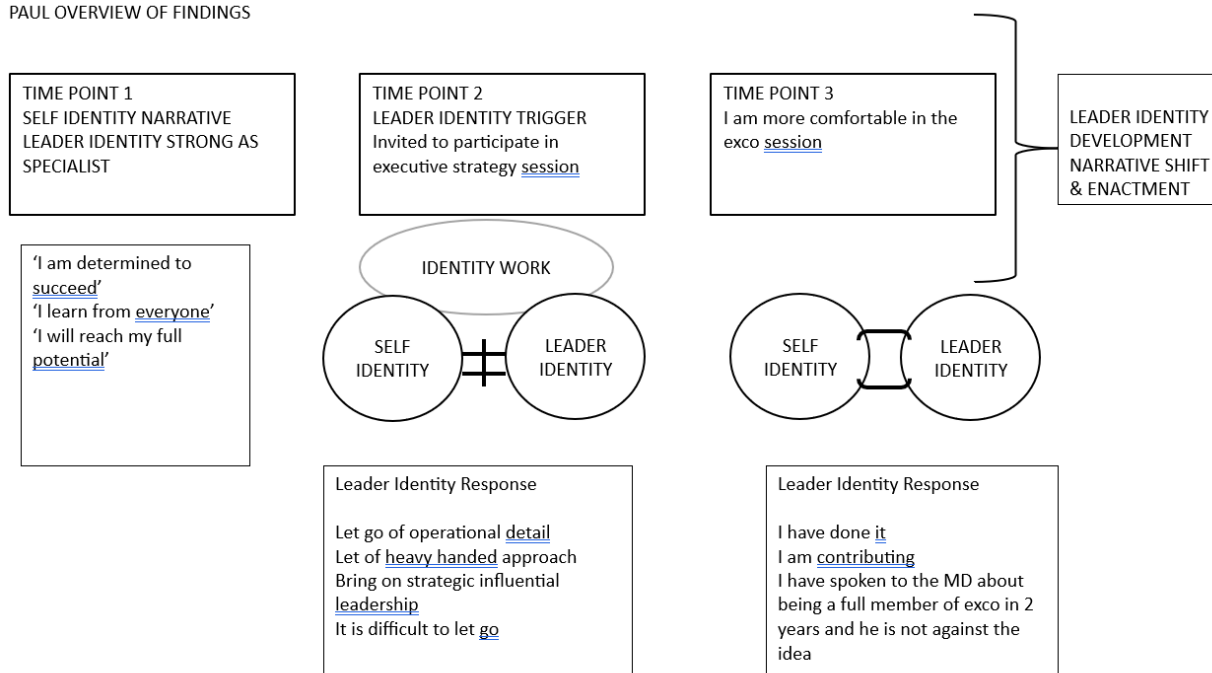


Figure 31

Paul's Leader Identity Development Over the Three Time Points

It became apparent from time point 1 that Paul has a strong and salient self-identity. His self-identity is one of being confident, with a positive outlook, driven and determined to succeed. His past self-identity narrative is a driver, a motivator to him. He learnt to be entrepreneurial from his farmer trader family members and is driven to get employment due to financial constraints. He refers to his past self-identity narrative regularly as a driver for him both in what he learnt but also in what he wanted to move away from – he did not want to be a farmer and was ambitious to progress in his career. He is the first of his family generations to work for corporate and to get a tertiary qualification and he is driven to keep learning and to keep stretching himself.

Paul appraises any potential triggers as minimal or inconsequential when they do not impact his career and aspirational leader identity. He is focused on achieving his future goals in a way that aligns with his self-identity: confident, drive, high agency and a determination to succeed with a positive outlook that any obstacles can be overcome.

He grapples with not belonging in corporate initially with not having had past role models or a tertiary qualification but finds himself more confident with a sense of belonging in the executive team strategy sessions over the time period as he overcomes his limiting beliefs. He has great

confidence in his technical acumen and specialist knowledge and was driven to learn in every situation. He was never shy to ask or challenge. He has a high sense of self agency and internal locus of control and has made career and life changes with no hesitation to serve his driver to continually grow and reach his full potential. He is aware that his confidence and determination to succeed and learn are at times perceived as arrogant and high handed and this is his least preferred leader identity.

Paul's self-identity narrative serves as a motivator to his career ambition, learning and evolving leader identity. Paul identifies as a specialist in his identity and his leader identity. Paul has grown specialist skills, technical acumen and operational expertise driven by his pervasive learning goal orientation and ambition. He is appointed to roles that draw on his technical and specialist skills. He has loved his work. And he differentiates himself, proudly, as the specialist in the room as his value and contribution as a leader and for belonging has come from this identity.

However, he also experiences that this identity and reputation of being the technical expert do hold him back in career ambitions to progress from being a strategic leader, a fully-fledged member of the executive committee. He battles with releasing his leader identity as the technical expert, partly because the business holds him to this contribution, and partly because of the strength of this identity.

By Time point 2 Paul experiences his invitation as a guest and to contribute to the executive committee strategy session as a guest, as a leader identity trigger. He has a career goal to be a fully-fledged member of the executive committee within a two-year period. And he sees that he needs to develop as a strategic leader to fit this role – to let go of his technical expertise and empower his team and team members. This is a bit shift for him. Paul also recognizes that to be more of an influential leader he needs to develop as a guide and be more approachable and less heavy-handed.

There is tension between his self-identity and leader identity as a specialist. Paul does not want to or states neither does he believe he can, change himself as a confident, say arrogant, person either. Yet he in his identity work finds a shift in his narrative which taps into his self-identity as a guide, and as a leader tapping into his specialist knowledge and tenure as a differentiator which allows him to belong and to delegate with authority. He takes his leader development seriously and is fully active in the management development programme.

Paul commits to grow his leader identity as a human centred leader, a guide and influential leader who makes a difference to people. This involves letting go of holding the operational detail, empowering his team, and adopting the role as guide and support to this team. This he then enacts as he does delegate more and empowers his team, as well as guides others who come to him for help during this time period.

By time point 3 Paul is evolving into his aspirational leader identity narrative. His leader identity is developing. It aligns with his preferred leader identity of not being too heavy handed or arrogant, and of being the guide and seeing others succeed. His aspirational leader identity aligns with his learning goal and career ambitions, which he has enacted by committing to the learnings of the management development programme and by engaging his MD about his next career move. There is a synergistic tie between his self-identity and developing leader identity. His leader identity is salient and stronger, and this aligns and is underpinned by his strong self-identity.

4.15. Integrated discussion from Paul's findings- experience of the appraisal of leader identity triggers and the impact on leader identity development over time

In sum, Paul is consistent throughout the time period of demonstrating a strong self-identity, agency and learning goal orientation. His specialist skills have served his career advancement well over his career and he is now intentionally shifting away from this identity to better serve him in his career aspirations. This is difficult and Paul undergoes identity work in developing his leader identity.

The identity work is experienced in the dynamic interplay in his intrapersonal identity network between his current leader identity as technical specialist, his emerging and aspirational leader identity as strategic, human centred, guide, between his strong self-identity and preferred leader identity not as arrogant or heavy handed.

All are influenced by his high self-agency, internal locus of control, drivenness to learn, learning goal orientation and ambition to keep learning and to reach his full potential. He does enact the emerging leader identity. His leader identity narrative aligns with his self-identity and the tie is synergistic. He is confident he will achieve his next career goal, even if that means leaving his current employ. Paul has developed his leader identity over time.

Table 5

The factors of Paul's Leader Identity and Self-identity

	Leader identity strength and salience	Self-identity strength and salience	Influences	Self-identity narrative	Leader identity tie with self-identity	Leader Identity Development
Paul	Strong	Strong past self-identity narrative	High agency Internal locus of control Learning Goal Orientation	Self-identity narrative as a Motivator	Strong tie and alignment between leader identity and self-identity	Leader Identity Development and Enactment over time

The table summarises the nature of his leader and self-identity and how his past self-identity narratives serve as a motivator on his leader identity development. The influences in Paul's case are high agency, internal locus of control and a strong learning goal orientation. Not only does his leader identity develop over time but he also enacts this aspirational leader identity.

The figure below represents an abstraction of the phenomenon in question.

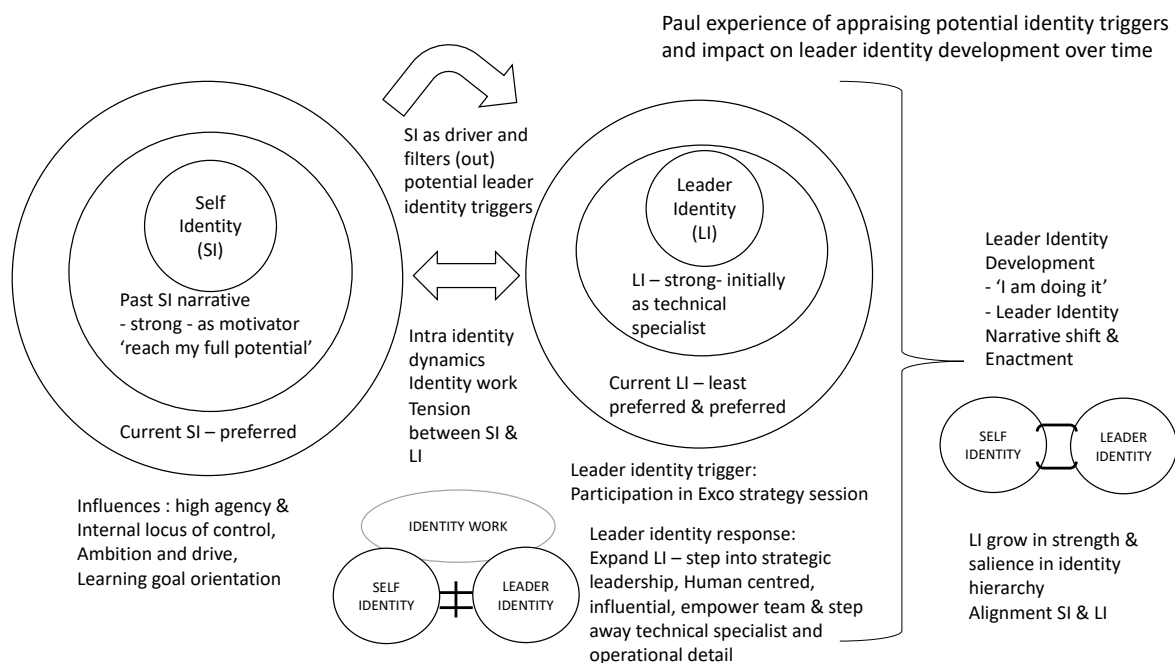


Figure 32

Paul Experience of the Phenomenon of Appraising Potential Identity Triggers and Impact on Leader Identity Development Over Time.

The first circle of the self-identity hosts a strong self-identity with a past self-identity narrative which serves as a motivator on his leader identity. The self-identity filters potential triggers and as his self-identity is triggered in this instance as his specialist expertise and his heavy handed, arrogant and confident style are seen as barriers to his ambition in his career to become a fully-fledged member of the executive committee within two years. His least preferred leader identity is the heavy-handed style, which he found to not be effective and to be misunderstood particularly in leading weaker team members.

The influences that drive Paul as his high agency, his internal locus of control and his ambition coupled with his strong learning goal orientation. Getting ahead from a skills and expertise perspective has always held Paul in good stead in getting noticed and promoted. The tension comes in as being the technical expertise is beginning to hold Paul back as he is 'cast in this mould', and as he finds it hard to let go of this identity. Paul had been grappling with wanting to belong from when he grew his career from being a farmer and selling vegetables at a market to joining corporate and progressing his career despite not having a degree. This he obtained and he keeps striving to learn more and find his place on the executive committee.

Paul experiences inter identity tension and identity work between his self-identity and leader identity. Paul resolves to step into a more strategic leadership function, build his team and empower them in making decisions around operational matters and to step into a style as a guide, human centred, influential. Paul shifts his leader identity away from only being a technical specialist to develop his leader identity towards an aspirational leader identity which aligns with his career goal.

He finds alignment between his self-identity and leader identity as his technical specialist knowledge differentiates him but not does not solely define him as he connects with being a guide, an identity he is proud of. Paul enacts his newly shifted leader identity over this period and even discusses his goal with his managing director, who affirms the goal and the shift towards his newly shifted leader identity as a leader how empowers his team and steps into a strategic function. Alignment is found between the self-identity and the newly shifted leader identity and Paul is found to have developed his leader identity over the time period.

The self-identity serves as a filter for what triggers leader identity, and when there is tension between these two there is identity work in the inter identity network and hierarchy. When there is alignment in a shifted identity, and this is enacted in this case, there is leader identity development.

4.16. Wendy: overview of group experiential themes

Four GETS emerged from the analysis of the findings from Wendy's interviews.

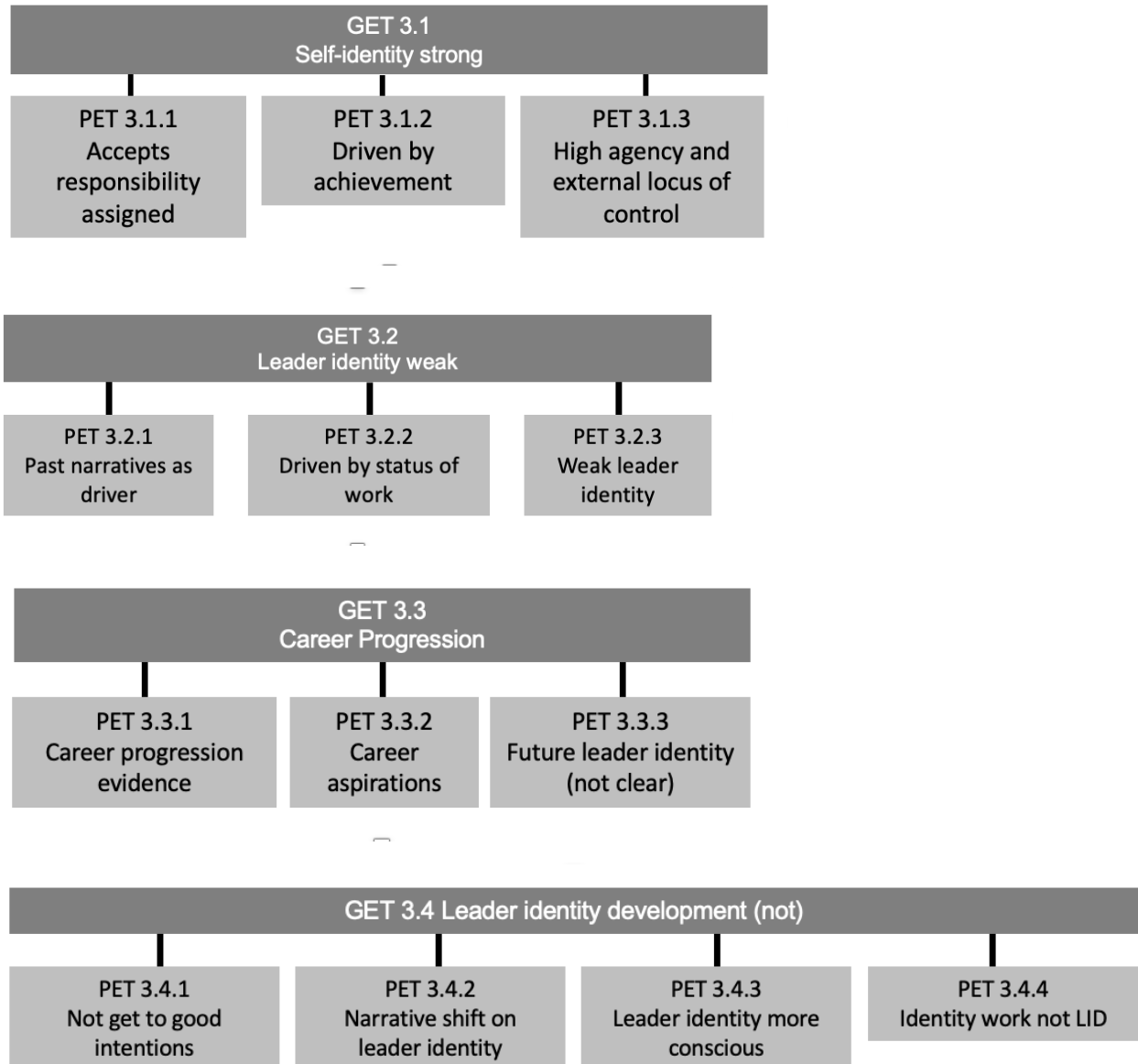


Figure 33

Group Experiential Themes Over the Time Period for Wendy

4.17. Discussion from Wendy's findings on GET 3.1: Self-identity strong

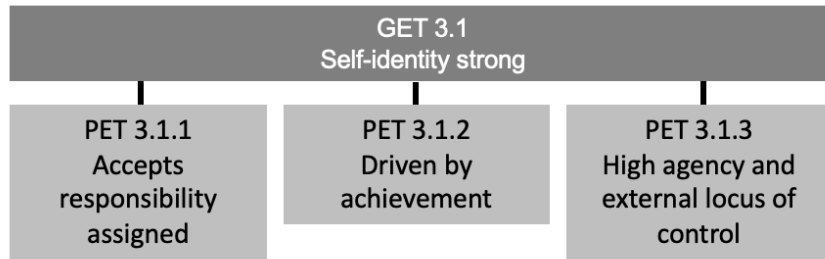


Figure 34

Group Experiential Theme for Wendy: Self-identity Strong

4.17.1. PET 3.1.1 Accepts responsibility assigned

Wendy is the eldest of three children and was required by her parents to take on a lot of responsibility, especially in terms of her siblings. When she reflected back, she linked her sense of being a leader as rooted in her childhood. Wendy defines this early role in terms of taking responsibility and taking charge.

“Maybe it is about the responsibility I was given from a young age [...]” (TP1, 7:56, ¶26)

She described her first awareness of her own leader identity as follows:

“[...] it has been something that has been with me since a very young age because I am the eldest of three children. ... there was always this thing in terms of that the responsibility like us going to school, that we would go together and I would look out for them. So I was the one who was given the keys to the house and locking and unlocking it when we come home from school, so ja, from a very young age.” (TP1, 7:41, ¶17)

Wendy recalls being assigned the responsibility of looking after her siblings in her matric year when her parents went overseas for three months:

“Then my parents also went overseas for three months when I was in matric and left me with the keys to the car, to drive us to my aunt to have dinner and with the access to the bank account, so ja I was given that, I didn’t maybe see it as a leader thing but as I was given this responsibility.” (TP1, 7:44, ¶17)

Wendy became more conscious of her own leader-identity when she was selected to be head girl in her matric year:

“Then maybe a lot more consciously would have been um maybe when I was in matric, and I was Head Girl.” (TP1, 7:43, ¶ 17)

4.17.2. PET 3.1.2: Driven by achievement

During the second interview Wendy was reflecting on her current experience in her leadership role and stated emphatically:

“So, so ja – so ja, we are working really, really hard! We’re working really, really hard.”

Wendy has high expectations of herself and sees herself, if not prides herself, at being seen as tough.

“I think it is about raising the bar for myself.” (TP1, 7:47, ¶ 23-24)

“I am still like very tough on myself in terms of expectations and standards, I am about that, you have to deliver for excellence right. (TP1, 7:62, ¶ 34)

“But also, the thing that I have seen that I think is an okay thing to have is the toughness” (TP1, 7:66, ¶ 39)

Wendy is ambitious and achievement-oriented and wants to add value. She references in her career moves a sense of accomplishment being achieved in one position before moving on to the next challenge:

“It was my sense of wanting to achieve, it was this thing about, I was not ever driven around getting to the next role, it was never about that or about making more money it was about my accomplishments and I think it was in that context in terms of you know, continuing to study.” (TP1, 7:47, ¶ 23-24)

“[...] I have done this, and it has gone pretty well, and I did it so what next you know and I think it is about raising the bar for myself.” (TP1, 7:47, ¶ 23-24)

“What drives it, probably because I need to feel that I am adding the value that I can, maximising the value that I am able to add as well as for me a sense of accomplishment you know because like what am I doing differently now, what is the next challenge.” (TP1, 7:69, ¶ 43)

4.17.3. PET 3.1.3: High agency and external locus of control

Wendy displays a contradiction in terms of her own agency. On the one hand, it seems like Wendy has a sense of agency in her life as she has made some bold career changes and life choices. She moves from the non-profit sector, to consulting, to corporate, to a family business and back to corporate:

“Then I decided that I wanted to make the shift to corporate, you know I had done well up until that point in the development sector... I even was maybe thinking about how it’s not seen as maybe tough or as demanding as corporate so I wanted to get into corporate and I thought the best place for me to do that would be via consulting. So, after finishing my MBA ... I joined CoE, ... but I always knew that I did want to get into financial services.” (TP1, 7:37, ¶ 12)

Wendy has agency and a learning goal orientation which guides her through her career progression, and she moves when she feels she has delivered results. On the other hand, when speaking about specific career changes she displays less agency.

“I ended up here by chance in that I got back into corporate after being in my own business and I don’t really have a network in Cape Town, I had spent most of my career in (province), so I just kind of connected with people and to get back in I took a role as a program manager on a contract basis [...]” (TP1, 7:9, ¶ 4)

Wendy displays an external locus of control in her career moves. She has agency in the choices to change although relies on external factors to move her. In this instance she prays for a move.

“I started here working in the distribution business [...] on one of their big strategic programs and their permanent offer came along and that is how I ended up here ja, but I prayed from 2009 to when I started at CoM [...]” (TP1, 7:9, ¶ 4)

4.18. Discussion from Wendy’s findings on GET 3.2: Leader identity weak

Three PETs are clustered for this GET for Wendy of her leader identity being weak. These are outlined in turn below.

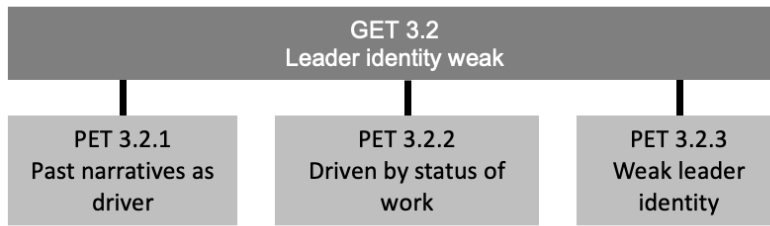


Figure 35

Group Experiential Theme for Wendy: Leader Identity Weak

Wendy's leader identity is aligned with her past self-identity narrative as taking on responsibility, hardworking, achievement-oriented.

4.18.1. PET 3.2.1 Past narratives as driver

Wendy links her leader identity to her childhood role models with a pragmatic, hard-working and grounded mother and a father who was a dreamer. She sees this as contributing to her leader identity as a pragmatic grounded person with the capability of having a bigger picture view.

"Maybe it is about the responsibility I was given from a young age and that you had to work... I think it is a combination of the responsibility given at home and that we didn't have much materially, I knew that we needed to work really hard, and I had an amazing example in my mother especially in terms of her working but also making and baking and stuff like that from home, in terms of making an extra income and she was really focused on budget and what needed to be achieved, so I think it is probably grounded in that and then combined with my dad was very much a dreamer in terms of he would speak about fantastic faraway places like Spain that he would probably never get to but giving you that window to something bigger than what you have, so I think that is what it is." (TP1, 7:56, ¶26)

4.18.2. PET 3.2.2 Driven by status of work

The status drive has been important to Wendy in her past identity narrative and it remains a driver for her current career and future career ambitions.

"I am what am officially called Head of Execution, so I manage the strategic change initiative in the personal finance part of CoM which is the biggest segment in CoM and I have been in my role from the end of 2016. So by CoM standards, I am still a newbie, if you are in a room with people from CoM they average ten years in tenure. So I am a newbie her." (TP1, 7:76,41)

"I worked with a lot of thought leaders and policy makers" (TP1, 7:34,9)

"I was placed at CoS and every week I was giving an update to a couple of the BP's like presidents. So they had different BP's in different parts of the business and every Thursday night I didn't sleep because my team would give me their updates on a Thursday afternoon and then I would have to consolidate the presentation for the next morning with the BP's". (TP1, 7:71, 30)

"I report to the Chief Operating Officer ... our MD sits in City A but I do attend the quarterly given my role and I do have a lot of engagement with the Exco ...But now it is time to have a cross-segment engagement more." (TP1, 7:71, 55-59)

Wendy is driven by her leader identity which is status led. Her perceived career gap drives Wendy to at least achieve and supersede her previous level and status reached in the corporate she worked for before. Wendy's past leader identity narrative drives her aspirational leader identity and career aspirations:

"I was probably at a similar level or maybe even more senior at COA than what I currently am now. Now I am in the top 50 at CoM, in 2008 I was in the top 200 at COA. COA I reported to the group Exco and I was heading up the lean deployment office ...and I was working with all the business units, vehicle and asset finance, credit cards..." (TP1, 7:25, ¶9)

Status is important to Wendy and she accepts a new role at the same time of her current role based on this driver.

".. the project that I mentioned is quite (huge), I don't know the exact amount now, but it's a couple of billion, and um, I think that that will give me a lot of exposure to the business, this part of the business, and also um... kind of help me clarify where I could possibly move to." (TP2, 10:7,57)

She takes on this role and by time point 3 declares she is working at the high-status level she aspires to work at.

“I think very much in terms of the appointment to this new programme, and I am really dealing with many of the enterprise board members. Ja, I meet practically every day with some of them. So that has definitely, I mean pushed me in terms of being more conscious of just how I show up and what I do and what I say and how I engage, and all of that.” (TP3,, 13:2, 21-23)

Wendy perceives herself although subconsciously as better than her team and aims to have a higher status.

Wendy tends to speak dismissively of others as not being on the same level as her:

“[...] I felt like from the early days that I was sent there for the challenge and the pure engagement, people were not and I am not saying that peoples intellect is linked to their qualifications, but there is a breath of kind of knowledge and what people have been exposed to and that engagement with people I miss, I was seen as the person with the answers that you go to get answers, so I had that engagement and I was missing that peer engagement and challenge.” (TP1, 7:20, ¶6)

One of the challenges Wendy grapples with is leading her current team. Wendy compares her past teams as easier to manage than her current team, which needs constant motivation to at least do the work they are paid to do. The past leader narrative is of an easier context of motivated teams, compared to her current position with an unmotivated team. This is the biggest challenge Wendy identifies that she is dealing with now. She identifies this leader identity trigger from the realm of her daily management work. She does grapple with how to achieve a shift in this team who view performance differently from her.

“[...] I had much easier followers [...] before than what I have now ..., a lot of the culture here is very foreign to me in many ways around excellence and commitment and that makes it difficult for me that people need constant motivation and that was probably my challenge now in terms of getting more of the team to operate at a level where they are the ones that want to go the extra mile and not that you are trying to do just get them to do what they are at least paid to do (TP1, 7:65, ¶37)

“[...] I think I am probably the most challenged at the moment from a team perspective because I was firstly in the development sector where the people who were involved with this kind of work were there because they were passionate about it, they were

wanting to make a difference in people's lives okay so there wasn't a lot of what I needed to do in terms of the teams right" (TP1, 7:64, ¶ 34-37)

"[...] in consulting you are like teams but you are also on your own, you have this journey that you are on and people show up in a way that they must because they are very quickly out of the business if they don't show up in a way that is needed [...]" (TP1, 7:64, ¶ 34-37)

"[...] when I was at CoBA it was a similar thing So it was generally our top talent and um similarly the people who were selected to work on these key programs was on talent, so they are very different people and then when I went into the business I am seen as an owner, I have automatic authority, I am a director shareholder and most of the team I selected you know [...]" (TP1, 7:64, ¶ 34-37)

It seems like Wendy struggles to work with those who are different from her or have different perspectives than her although she states that she embraces diversity. As a leader Wendy talks generically about needing to adjust her style to different people but shows little enactment (as can be seen in the previous data extract). She stated:

"Ja how I need to be more conscious of other people's styles, because I do embrace diversity, not just from a race or gender perspective but from a type of persons personality and experience as well and I do need to look at how I best leverage that for people who are different and understand that people are not all going to be like me, and so it is about how I need to adjust my style in terms of getting the best out of others." (T1, 7:67, ¶ 41)

Wendy is grappling with diversity and what this means for her as a leader. It seems like her aspirational leader identity is linked to embracing diversity, yet she struggles to enact this.

Wendy is even not learning from a recent overseas trip a country quite different from her current country of abode. Wendy expresses she is not learning much from her overseas exposure to a different country and different businesses. She had been on an overseas trip as a part of the management development programme prior to this timepoint and stated that although it was a lot of fun, not much learning took place:

"(Country) was very interesting; it has always been a place that I wanted to see so it was fascinating from a cultural and historical perspective. I really enjoyed it. It was very interesting. I don't think the learning was as much as I would have liked it to be, both from a ... from other business's perspective ... And then it was a lot of fun. It was a

teaming exercise for the class, ja! (laughs) It was tremendous fun, ja.” (TP3, 13:6, ¶35–37)

4.18.3. PET 3.2.3: Weak leader identity

Wendy assumes that a leader identity is aligned with a management role latterly and formerly, a perception and experience of herself as a leader. When reflecting on possible triggers she predominantly limits these to daily management work and immediate activities around her management. She mentions facilitating a session with her team that had positive feedback and presenting at a conference the next day. She doesn't think about her leadership even with the researcher's prompt.

“Ah well I do think of that um every day because I have a team you know, and I'm having to engage with them quite regularly. Um, so ja, I think there's just normal day to day stuff in terms of supporting the team around where they need assistance, support, direction on what they are doing.” (TP2, 10:8, ¶60)

“I thought I needed to um... that was when your email came, I needed to like sit down and think about this! But because I'm doing this presentation tomorrow, I need to get my pack done and it's just been mayhem. And we're in the middle of business plan so we're in extremely busy times, so I must be honest, I didn't really sit and think about it!” (TP2, 10:13, ¶86–88)

When asked to reflect on her leadership during the second interview she seems to avoid the question and speaks about being assessed for a future role:

“Um, the other thing is that I've been um... assessed for the next role in the organisation. I was totally stressed out about it because I always find those um, assessments, quite um nerve wracking...and I got the feedback yesterday and it was really positive! And um, my direct manager, the general manager, like the COO for our business unit, um... so the assessment I did was in terms of that level of um, the next level like that.” (TP2,10:3, ¶30–34).

Wendy's managerial identity is strongly task-oriented and results-driven and while reflecting on her leadership style she referred to the results from a personality profile (that uses colours to reflect preferred styles) she received a few years ago according to which she was described

as more considerate and accommodating as well as enthusiastic, encouraging, engaging and dynamic.

Wendy stated that she didn't like that and that she desired to be assessed as more analytical, disciplined, thoughtful, as well as direct, decisive, focused, determined, purposeful, confident. According to Wendy she is now more slanted towards these behaviours at home and at work.

"I was very green, yellow, and I didn't like it, I wanted to be more blue, red right so I think that lead back to my days of development and now I am high red and blue at work and at home". (TP1, 7:74¶63)

When Wendy describes her interpersonal relationships at work, she indicates that she doesn't really engage in socialising:

"[...] maybe I do kind of socialise in terms of that friendly chit chat as a leader and people, some people miss that or would like that, maybe I don't sit and chat" (TP1, 7:74¶63)

She interestingly mentions "chit chat" in the same breath as mentoring and teaching others which creates the impression that she either doesn't have a high regard for playing the role of mentor or teacher or that she feels herself lacking in terms of these roles and therefore diminishes the importance of these leadership roles to protect her self-identity/leader-identity.

"Maybe I don't sit and chat and mentor and teach as much as I would have previously but that is not a bad thing rather than a good thing" (TP1, 7:74¶63)

She then immediately speaks about a weakness she has identified, namely, being impatient. Interestingly she links her impatience to situations where people are not doing what they are supposed to do which again indicates her high managerial task-orientation and drive to achieve results not only in terms of herself but also in the way that she leads others:

"[...] I always recall saying that I think a weakness is that I don't have a lot of patience in terms of when people are not doing what they are supposed to" (TP1, 7:74¶63)

She then further states that it is difficult for her to be direct:

"[...] it's a difficult one because I am not being very direct [...]" (TP1, 7:74¶63)

Here lies a contradiction between the way she describes her leader identity and how she enacts her leader identity. She does not act in the way she wants to be described in her profile.

In addition, there is a tension within her between her impatience and drive to achieve results on the one hand, and the perceived needs of others (wanting friendly chit chat, mentoring, and being taught), which Wendy does not have a preference to fulfil.

When asked to reflect on what led to this dramatic shift in personality types, she struggles to pinpoint it. She considers a range of changes in circumstances that could possibly have resulted in her change in self-identity and leader-identity:

“Um shoo, I can’t tell exactly what has changed” (TP1, 7:72, ¶ 61-63)

“I think that lead back to my days of development [...] possibly or circumstances, single mom raising a teenager, I don’t know, getting older, things that have happened in my life, I don’t know but that’s what happened so I don’t know in terms of maybe it’s the teams that I deal with that I needed to be different you know than the way I engaged teams before [...]” (TP1, 7:72, ¶ 61-63)

“[...] I think I have changed in terms of just as a person in terms of getting older, having different context, life experiences etcetera and that would have influenced my leadership style as well” (TP1, 7:72, ¶ 61-63)

“[...] it’s a difficult one for me to answer over the years what has that change meant” (TP1, 7:74 ¶ 63)

Her inability to clearly articulate the reason(s) for the shifts in identity could be linked to a further tension between her self-identity, leader identity and an aspirational self-identity and aspirational leader identity.

4.19. Discussion from Wendy’s findings on GET 3.3: Career progression

This GET for career progression has three PETs clustered under it and these are outlined in turn below.

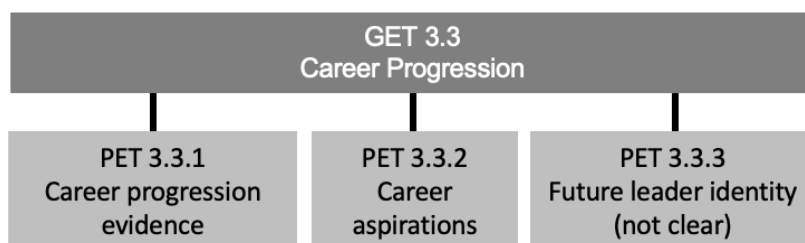


Figure 36

Group Experiential Theme for Wendy: Career Progression

4.19.1. PET 3.3.1: Career progression evidence

Her biggest shift in her professional identity was this move from the development sector to the corporate world, moving from development ethos to business ethos.

“I suppose the biggest shift was in terms of going from the NGO sector going to do the MBA and then moving into consulting, .., I think that was in terms of that and then changing that into a new environment that was going to raise the stakes, expose me to different teams, fundamentally different, a business ethos rather than a development ethos, I think that was probably the biggest shift.” (TP1, 7:46, ¶ 21)

While Wendy was in her first corporate environment a family tragedy struck her. She decided to move cities with her son to be closer to family. And there she took on a management role with a family business. To her this was a gap and she aspired to join corporate again and to reach and exceed the level she was at in her previous corporate role.

“I thought I would be there for two years and then move on but then I stayed probably six and I knew that I loved working in the business but a big gap for me was ... And I always felt I like the business and it was amazing to see how it was going from strength to strength every year... (TP1, 7:16, ¶ 4 – 6)

4.19.2. PET 3.3.2: Career aspirations

Wendy does articulate her career aspiration during the first interview, namely, to move out of project management into the business side of financial services, and the status of engagement and level of work are important to her. She receives external validation through positive feedback on an assessment to move to the next level in the organisation.

During the second review, she indicated that she was assessed for a future role:

“I’ve been um... assessed for the next role in the organisation. I was totally stressed out about it because I always find those um, assessments, quite um nerve wracking; I always feel that I don’t have enough time. And so I did that, and I got the feedback yesterday and it was really positive! And um, my direct manager, the general manager, like the COO for our business unit, um... so the assessment I did was in terms of that level of um, the next level like that.” (TP2, 10:3, ¶ 30 – 34).

During interview one it became evident that Wendy drives her career progression and aims to move to higher levels, with an ambition of doing this in a financial services firm. She is even considering questions for her next career move. She wants to be in the core business of financial services, not projects where she currently is.

but I am also thinking about what because I am still in project management right, maybe financial services, I am basically doing the same stuff and I am now looking at where to from here, how do I leverage my time in the business and what I did there to where I currently am, how do I use those skills and experience best and like where is it that I would want to kind of go as a next step because I always wanted to get into financial services and then I wanted to get into the business and not like projects so that is where I need to be focused now, what is that business?" (TP1, 7:68, ¶41)

4.19.3. PET 3.3.3. Future leader identity (not clear)

Wendy is not clear of her future aspirational leader identity.

"[...] but I am also thinking about what because I am still in project management right, maybe financial services, I am basically doing the same stuff and I am now looking at where to from here, how do I leverage my time in the business and what I did there to where I currently am, how do I use those skills and experience best and like where is it that I would want to kind of go as a next step because I always wanted to get into financial services and then I wanted to get into the business and not like projects so that is where I need to be focused now, what is that business?" TP1, 7:68, ¶41

"I am... um, I have identified a few people in the organisation, and I'm engaging them with sort of... I have already had some of the sessions in terms of general conversation about better understanding of the um experience, their business units – and also talking to them about me, and where I'm at, and my interests and what I'm thinking about, to get their views on sort of possibilities for me." TP2, 10:11, ¶74

"[...] ja, so I think that's quite good, I am a bit anxious about it! It's highly politicized, highly politicized, and I don't operate like that. I operate on what must be done for the business and not about my interests and things like that. So I'm a bit conflicted. And you know there's one part of the business that needs to deliver this, they're way behind, way over budget, and so one part of the business, which I am in, is waiting for this – and we need it for our business. Ja, so the other part who is delivering would like to

paint say a rosier picture than what there is. And these are very serious people, very senior people in the business. And I have not had a lot of exposure to them, to date. So ja. TP2, 10:05, ¶40 – 49

She does need external validation and her impressions matter to her in this important strategic project role so she does attempt some shifts in this to serve her impression management in more senior meetings. This does not represent a leader identity shift.

“So I think I’m not in sort of big groups someone who speaks the most, and I think that is sometimes expected. And it’s not because I’m not confident, it’s just I’ll pick the conversation up with somebody outside the meeting. ...And I find that there’s a kind of expectation that you need to be talking so much, as if you don’t add value if you don’t! Ja, but I do also appreciate that it’s important in terms of my profile. So I am trying to do more of that in more senior meetings, ... I think it’s unnecessary (laughs) but I understand that it’s going to be necessary in terms of some of my profiling that I do that. ... I think this new responsibility is going to push me to do that.” (TP2, 10:16, 108-113)

Even with the new role and not meeting the commitments to her team, Wendy is engaging around options for her next career move. The drive to constantly strive for more is strong for Wendy. Wendy talks to the COO, her mentor about where she would go from there. But her aspirational leader identity and her career goals are not clearer. She is gathering information and getting exposure across the business.

“I have also advanced some of the things I want to do in terms of where I go to from here, and have engaged with the COO and you know, she is kind of being like a mentor to me and will be part of my journey in terms of what will be next. Um... what has been fantastic is that I am simply getting a lot more exposure to the business and how it works. So yes, it is helping with the information I have – not necessarily making it clearer as yet – but it is adding into what I know, so then that will assist me in terms of getting a clearer picture.” (TP3, 13:3, ¶23 – 25)

During the third interview, Wendy talked about her career advancement being based on what she delivers, for the business. This an underlying theme in her self-identity narrative and her ambition as a leader. And her aspirational leader identity is and has been status driven. Wendy is inadvertently very aware of levels, status and by default power and politics in an

organisation. She chooses to engage in a role that affords her an opportunity to engage with board members daily. Yet she claims to not be ambitious to climb the corporate ladder and that she has no need to play the politics.

This is a blind spot and tension for Wendy. She is seeking to please the board members as she questions how she comes across. This leader identity narrative places a bind on Wendy as she has to deliver, and she cannot claim her ambition in her future aspirational leader identity. She has not shifted her leader identity narrative over this time period.

*“I... while I have always been interested in getting new challenges and growing my career in that respect, I have never been somebody who is like ambitious from like I need to climb the corporate ladder; that doesn’t interest me. And I think that lens or that sort of values that help me to focus on I do what I do in the interests of the business, rather than what is in my interest. And because of that there is no need to be playing the politics. I think so, anyway. Ja, and I have always been very fortunate in the way I have advanced my career, but it has always been based on what I deliver and not about (who) I am kind of trying to ... please and things like that, ja.” (laughs)
(TP3, 13:8, ¶ 41 – 44)*

4.20. Discussion from Wendy’s findings on GET 3.4: Leader identity development (not)

Wendy has not developed her leader identity and the findings are outlined below for each of the four PETs.

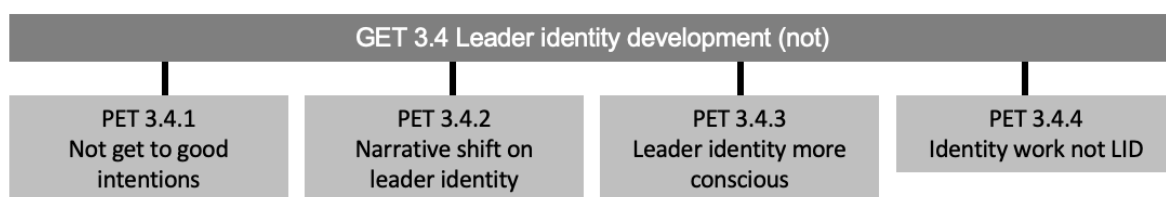


Figure 37

Group Experiential Theme for Wendy: Leader identity development (not)

4.20.1.PET 3.4.1: Not getting to good intentions – not enact

Wendy accepted the role with the high-status project because Wendy has an external locus of control and she accepts responsibility assigned to her. She does not however act on her

intentions she had set for her team, due to her now pressured time commitments, she says. She gets swept away in the responsibilities and time demanded of her in the new role.

“So now with this other role, that’s now going to disrupt that a bit, in terms of how I’m going to be very busy with that, so that kind of ambivalent, you know, rather conflict or ambivalence around this new piece of work Ja, it’s going to be very demanding in terms of the meetings I have to attend, in terms of the engagement with different teams. It’s going to take a lot of my time.” (TP2, 10:12, 76-82)

However Wendy does not get to her good intentions with her team. In other words she is not actively shifting her leader identity and is not enacting it, although given the raised salience of her leader identity she is aware of the gap.

“In terms of how crazy the past while ...and it has just been like go, go, go – there has not been much time (laughs) to really stop and think and reflect. ...And you know what I wanted to do with my team and all the plans I had and you know, now all of that has just now needed to be adjusted, given the other demands on my time.” (TP3, 13:12, 48)

The impact of Wendy investing in this new role is that she is shifting how she manages her team. In Wendy’s own admission she is working at the right level of work as she lets the people run with their work themselves. She is letting go more and not obsessing about things being perfect. Because she does not have time. It is not as if Wendy has shifted her self-identity nor her leader identity. She does not see herself differently as a leader. She does not have time to delve into the detail and lets her team run with work.

“I am probably doing less of the... doing more of the right level of work in that I am doing less of the detail simply because I don’t have time. So I am focused more on the level of stuff that I should be focused on. ... so I am kind of leaving it more, I am giving people sort of ‘this is what I need’ and letting people run with that themselves. I am still available to the team in terms of guidance but I am finding that I am letting that go more, and I am also maybe just not obsessing as much in terms of wanting things to be so perfect.” (TP3, 13:4, 27-29)

Wendy is attempting to craft a different and positive narrative of having actually achieved in her current role as a leader of her team and of having used her skills and experience in a

positive way She talks to not getting into the detail and having done things differently in vague terms. She also states that there is loads more still needed, also a vague reference.

“Um... I also come with you know, not having been in the detail that other people have been in, So I am happy with that in that I have been able to use my skills and experience in a positive way with this, and in terms of the... .. So I am fine in terms of where I am at the moment. There is loads more that is still needed, there are things happening daily and changes being made daily in terms of what must be done and how we approach it. (TP3, 13:15,55)

Wendy has had plans for her team and good intentions but has not gotten to these. She had wanted to engage her team, coach, mentor, but it has just been busy, absolutely crazy, chaos.

Ja, it's been a very hectic time with the new responsibilities that I have, and so I am very conscious of all the good intentions I had... My calendar is absolutely chaos at the moment; we are busy with this massive programme with teams all over the world, and going to pilot in the next few days!

So it's been absolutely crazy and I mean the biggest thing that is bugging me is in terms of these good intentions I had around the journey with my team and what, you know, the engagement I want for them, and the coaching and mentoring I am wanting to do and the introduction of new ways of work and you know, just the space to think around what we are doing next year. And so a whole lot of that, you know? (TP3,13:1, 4-9)

Well then as I say I am very conscious I am not getting to the good intentions I had with respect to the team, I am doing some of it but not nearly as much as I would have liked to. And then also I know that at times – at least I am conscious of it – so I manage it better, I can feel the annoyance levels are higher (laughs) (TP3, 13:19, 19)

4.20.2. PET 3.4.2: Narrative shift on leader identity

During Wendy's second interview she crafts her leader narrative that she has achieved enough in her current role and justifies that she can step up into a new role and that she is ready for it.

“I enjoy what I do. I am very happy about what I’ve achieved in the past um two years – because that’s the time I’ve been in the role, and I’ve really set up the department. But I am, apart from this new thing now around this program that I need to be on, um I was feeling around ... okay, it’s um time for me to get new challenge.” (TP2, 10:12, ¶76–82).

This is not an indication though that her leader identity has shifted. She experiences tension in what she is expressing she desires to shift. She has taken on a new role and even though she says her biggest challenge is this team; she now has not assigned any time or effort to act on her intentions as a leader with them. Yet she shifts her narrative around being happy with her team, without any changes in her leader identity or actions. Her leader identity is driven strongly by the status of her new role, to match the past aspirational leader identity.

During interview one it emerged that Wendy grapples with working with those other or different from her. During the second interview, she spoke about working in a syndicate as part of the management development programme and stated that was trying to listen more.

“Um, I was very conscious in my engagement with the team in terms of practising, um, listening more and that sort of thing. Um, so I do think that I did that; I found myself physically restraining myself in certain instances, especially because it’s quite pressured, um the time we had to complete to certain tasks. I feel that um... ja, so I didn’t as a result um...I contributed least, with me holding back and giving other people more of a chance.” (TP2, 10:1, ¶15–21)

This is not a positive experience for Wendy as the results were not achieved and she physically held herself back and could have added more value. Wendy experiences tension between her self-identity narrative and drivers with her chosen behaviours (and potentially aspirational leader identity to leverage off diversity in teams).

“So, and I don’t... I am obviously biased, but I don’t necessarily think that that was positive. I mean it was positive in the sense of what I did, and allowing other people to um... engage more, or to like give them an opportunity and to like listen more to them, but I do think that um, there would probably have been more that I would have added, given the time that I did it.” (TP2, 10:1, ¶15–21)

Wendy indicated in her second interview that she was more aware and appreciative of diversity but fails to provide examples of enactment apart from vaguely referring to trying to leverage diversity:

“I think one has been around um just more appreciation around different um... sort of personas and what people need in terms of how I relate to them. So, I’ve a much higher awareness of that, and trying to leverage that better.” (TP2, 10:9, ¶ 65–66)

Wendy does not shift her leader identity despite her intentions of doing things differently as a leader.

4.20.3. PET 3.4.3: Leader identity more conscious

During interview three Wendy stated that she is feeling annoyed. There have been a range of perceived interruptions that potentially prevent her from solely focusing on the programme role, that is matching her need for status and recognition, and matches her aspirational status level. She has a new manager who takes her time and adds to her annoyance. She is finding it difficult to manage it all right now, as the pressure of delivery also mounts. She is driven by achievement and results. Subsequently, Wendy filters potential leader identity triggers that prevent her from achieving this in a negative light.

Um... ja, you know every time you have a new manager you start afresh in terms of them understanding what you do and getting used to them, and what can often seem like unnecessary questions because they are needing to understand and... So you are in a situation now when you really have less time, and I do feel my level of annoyance sometimes higher than normal! ...it just adds to the time and annoyance. Ja, so it is difficult to manage all of that right now. And then also we are getting to the last quarter, so that also, people are generally more tired and there is a lot of pressure in terms of wanting to make sure you deliver this side of the year, so all of that you know, the combination of all of that is just kind of culminating. (TP3, 13:18, ¶ 9–17)

Wendy is not achieving with her current team as she has not met the intentions or plans, she set with them from a leadership point of view. She has pressure to deliver in her current job and with a new manager. And she is concerned to be perceived as delivering well on the strategic project engaging with the board members almost on a daily basis. She assigns blame to external factors such as lack of time making it chaotic, crazy, hectic.

Wendy is not demonstrating high self-awareness as she also holds onto her preferred self-identity narrative as being someone who is pragmatic, in control. She has a blind spot or is in denial that she is not stressed and is prioritizing and not getting flustered and that she is handling things. She categorises what she is dealing with, almost compartmentalizing herself in each category. Different identities are called on in different contexts and there is a dynamic interplay between these.

Her past narrative still filters her appraisal of herself and her context, where her lived experience is that she is finding it hard to manage at the time, and her annoyance levels are higher than normal. She is stressed and there is an inner identity work as to which identity is salient – her past self-narrative, her aspirational leader identity, her intentional management identity.

“I think you know I am quite pragmatic, so I am able to prioritise and know what the important things are and there are just so many hours in a day so I am just able to manage that, you know? It is just in terms of what I am like, I am not sort of somebody that gets flustered or let’s pressure get me down. I just deal with it; I take it in my stride. I look at what I need to do and then I handle it. And I think it is just the approach of doing that. You know I am able to not sort of get stressed out about it. I look at what is before me, and I look at how I need to handle it and I just get on with it. So, I think that helps me in how I would categorise stuff and look at what I need to deal with and how I deal with it.” (TP3, 13:20, ¶ 31 – 33)

4.20.4. PET 3.4.4: Identity work not leader identity development

In terms of intra-identity dynamics Wendy experienced identity work by timepoint three and this emerged as tension in her intra-identity hierarchy. There was identity work around salience and self- and leader identity narratives. This did however not culminate in leader identity development.

Ja, so it is this balancing act that I need to be ... you know, that balancing act that I need to be doing all the time. And what is important is making sure that I engage with the right people, so that I get the right level of information as and when I need it; because you can’t just be saying things and you don’t have the facts to back it up. ...

So, it is different things that I needed to do, and I suppose they are all different components of leadership. TP3, 13:14, ¶51

4.21. Integrated discussion from Wendy's findings – shifts over the time points

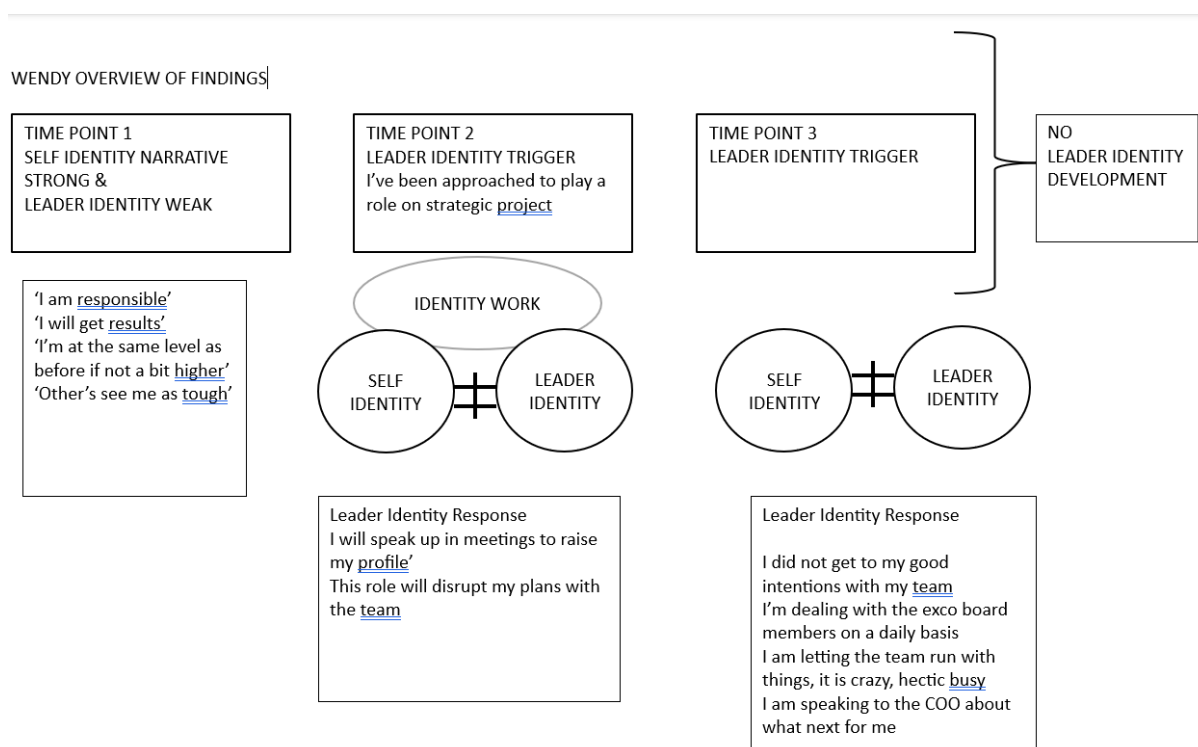


Figure 38

Wendy's Leader Identity Work over the Three Time Points

In time point 1 it becomes clear that Wendy is driven by her strong self-identity in which she accepts responsibility assigned, driven, high agency, pragmatic, hardworking, achievement focused, tough. Her self-identity remains salient across the three time points Her self-identity is closely aligned with her identity at work. She is ambitious, has a high learning goal orientation, is achievement oriented, and results driven, and is viewed as tough. Her identity at work becomes the expression of her self-identity in her management role. Wendy has high agency and drives her career changes and progression, yet she has an external locus of control as she offered opportunities for career advancement.

Wendy's leader identity is not clear and is expressed in two ways with a vague, aspirational leader identity and an intentional leader identity with her team.

Wendy appraises potential leader identity triggers through the lens of her self-drivers. Status of level of work accepting responsibility from higher authorities, and status of who work, is of paramount importance in Wendy's leadership career changes. Status remains important in these choices as she takes on a strategic project role over and above her team management role. She has one appraised one potential leader identity in the time period and this is when she is approached to take on a role on a high-status strategic project, to run in parallel with this.

By time point 2 Wendy experiences taking on the strategic project role as a trigger to her leader identity. There is a tension emerging between her self-identity of being achievement driven and wondering how she will balance her current role with this all-important status driven role and with the new role pushing her to come across differently in speaking up in meetings and engaging in organisational politics. There is tension between her self-identity and leader identity.

Wendy's appraisal of the leader identity triggers is influenced by her past leader (aspirational) identity narrative which is, due to the nature of her drivers (status of level of work and status of who she works with) focused on assuming a hierarchical role in the organisation rather than on developing her leader identity. She appraises the trigger of being offered the opportunity to fulfil a strategic project role positively as it aligns with her self-identity and past aspirational leader identity and offers her the opportunity to take on a high-status role and engage with group executive members on a daily basis and with exposure across the corporate.

But when she appraises this leader identity trigger a conflict arises within her inter identity network. She has a vague, intentions with her team and her current status driven role compete for her time and her identity intentions. The team leader intentions are around her developing her leader identity to motivate her team, develop them, empower them, do things differently. The high-status role talks to her stepping up to the higher status expectations of those in higher authority, such as speaking up in meetings, managing politics with those in higher authority. And in both she wants to achieve.

By time point three Wendy is annoyed, stressed, hectic, crazy, busy and has not gotten to the good intentions with her team as the role has demanded her time. The identity work tensions are playing out for her.

She is aware of the gap of her not meeting her good intentions for her team. She has chosen to reinforce her status driven leader identity. She does not develop her leader identity as a better team leader. Yet she cannot be seen to have not achieved. In an attempt to resolve this conflict, she changes her leader identity story of her leading her team to manage impressions. She has left her team to deliver more because she does not have time, given the pressures

of the high-status project role. She has not changed her way of leading or her identifying as a different leader.

Wendy has not shifted or enacted her leader identity over this time period. The identity work continues between the leader identity and self-identity. She must achieve and take responsibility (as she did in the new role on the programme) but this means she is not getting to her 'good intentions' with her team, which means she is not achieving and not shifting her leader identity, as to who she is as a leader. She back casts her take on this experience to reflect intentions in 'leaving her team' yet at the same time emphasises how busy, crazy, hectic it is with all the time she is allocating to the new role.

Even though her ideal leader identity is not clear Wendy has spoken to her COO about her future and getting exposure across the business to get a clearer picture for herself of the next opportunity. Wendy claims she is still formulating an aspirational leader identity and career goal. Since her past leader identity narrative drives her career aspirations, the prediction is that her future leader identity will also be based in her positional role without necessarily showing any enacted leader identity development. Her past aspirational leader identity compels her to keep moving, keep accepting responsibilities, of a higher status, which she has the agency to seek, however she lacks the locus of control to bring these into fruition. The dynamic interplay in her inter identity network and hierarchy between her self-identity and leader identity is ongoing.

4.22. Integrated discussion from Wendy's findings- experience of the appraisal of leader identity triggers and the impact on leader identity development over time

Wendy does not develop a stronger leader identity, but it does remain salient. She experiences identity work between her self-identity and her leader identity. Her self-identity of the past drives her and is a constraint in that it compels her to accept responsibility assigned from those in higher authority, and in this instance she is excited and anxious as she takes on the high-status project role in addition to her current management role. The influences on her are her high agency coupled with an external locus of control. With her drive to achieve she does have a learning goal orientation in which she selects learning opportunities to support her career development. There is a tie between her leader and self-identity, and this does not shift over the time period. Wendy does not develop her leader identity over this period.

Table 6

The Factors of Wendy's Leader Identity and Self-identity

	Leader identity strength and salience	Self-identity strength and salience	Influences	Self-identity narrative	Leader identity tie with self-identity	Leader Identity Development
Wendy	Weak Salient	Strong self-identity narrative	High agency External locus of control Learning Goal Orientation	Self-identity narrative as constraint	Tie and tension between leader identity and self-identity	No Leader Identity Development

These factors and the time points have been compiled into a comprehensive diagramme of the phenomenon as experienced by Wendy of her appraising potential leader identity triggers and the impact of this on her leader identity over time.

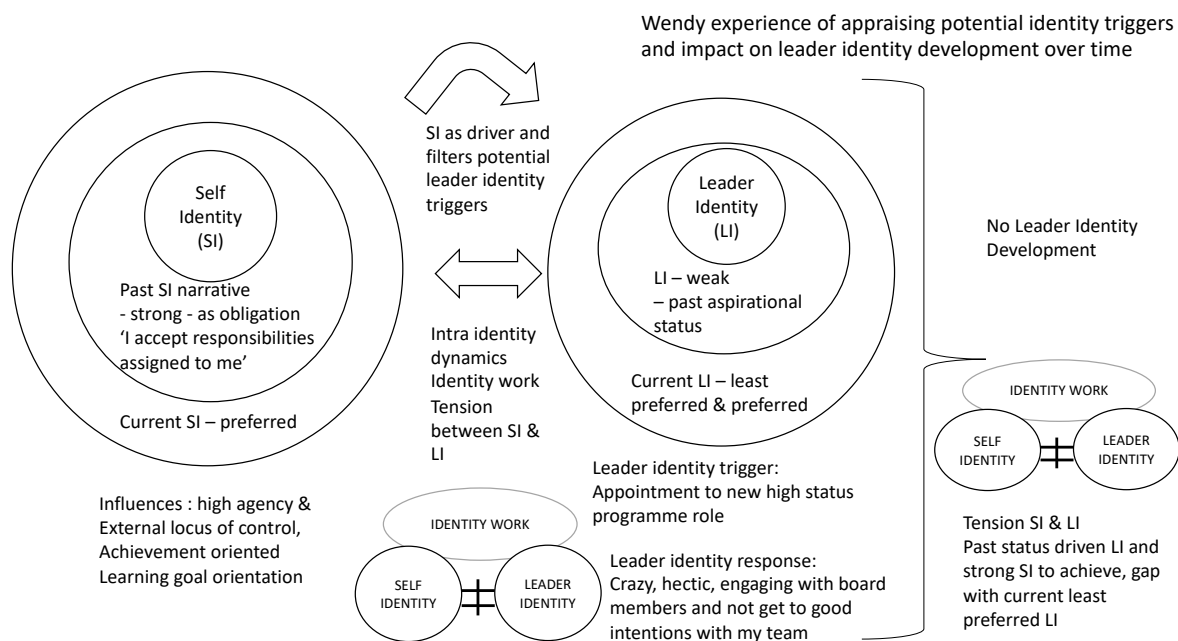


Figure 39

Wendy's Experience of the Phenomenon of Appraising Potential Identity Triggers and Impact on Leader Identity Development over Time.

The first circle in the diagramme depicts the self-identity which in this case the past self-identity narrative is strong. Wendy holds a preferred self-identity of being tough, driven, ambitious, capable. There is a tie with the leader identity depicted in the right circle. Wendy has a weak leader identity which is not clearly formulated, although it is salient in the inter identity hierarchy. Her past aspirational leader identity is status driven.

By time point two Wendy experiences the appointment to the new high status project role as a leader identity trigger. Identity work is triggered as her self-identity is driven, and accepts responsibility assigned by those in authority, and her leader identity is driven to achieve which she cannot do as her attention is taken away from her good intentions with her team. The self-identity is the driver and acts as the filter of the potential leader identity trigger. The potential trigger potentially impinges on her self-identity and hence the trigger is brought into attention. Identity work is triggered between the self-identity and the leader identity and the anxiety and tension grow over the time period.

By time point three Wendy is experiencing heightened pressure as she balances both roles, and the identity work continues. She is engaging with high status board members almost on a daily basis and she is engaging with her COO and being exposed through the role to explore her next career opportunity. She is not clear of her next role. She does not have a clear aspirational leader identity and status remains her key driver. Yet she is also acutely aware and conscious that she has not met her good intentions for her current team she is managing and has left them to get on with the work, due to time pressures. To appease her drive for achievement she claims this narrative as intentional. Yet she has not developed her leader identity nor enacted a different leader identity over this time period. The self-identity and leader identity remain in tension in the inter identity network.

4.23. Dion: overview of group experiential themes

Three GETS emerge from the findings of Dion and these are outlined below.

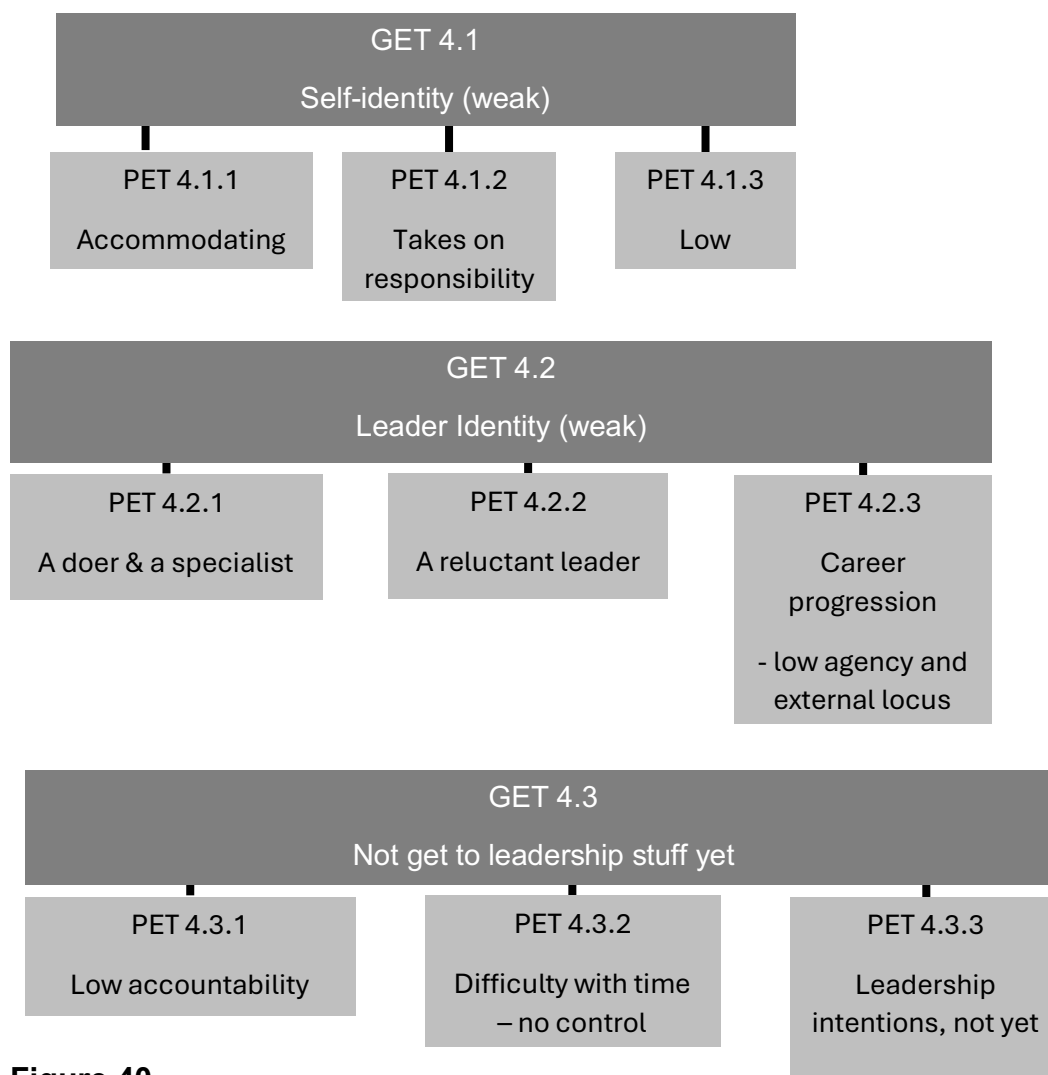


Figure 40

Group Experiential Themes over the Time Period for Dion

Dion has a weak self-Identity and a weak leader Identity. The dynamic interplay with these inter-identities builds tension and the identity work unfolds over the time period, worsening Dion's experience and impact as a leader. There is no leader identity development over the time period and Dion's confidence spirals downwards.

At our first interview and at the first time point Dion finds a spot for us to sit in a shared conference room at the side of the open plan office. He knows there is another booking and says we may need to move, which we do later on, and he finds a space for us to sit in the coffee rest area later on. This is symbolic of how Dion sees himself as a leader, not in his rightful place and not knowing where his rightful place is, nor commanding or creating it. During the interviews Dion shares his leadership journey in a confused and lengthy manner,

as if he was trying to make sense of it himself, but not quite getting to the kernel or the essence of who he is as a leader, and where he wants to get to nor how he will get there. He is in essence stuck in a pattern.

Dion has worked for the same company for 23 years and has moved roles over his career, with one common defining feature between the roles being that he sees himself as a technical specialist. His leader identity is weak and his self-identity is weak, and this dynamic plays out in ongoing and anguishing identity work. There are four GETs for Dion:

- Self-identity weak
- Leader identity weak
- Not get to leadership stuff yet
- No leader identity development

4.24. Discussion from Dion’s findings on GET 4.1: Self-identity weak

Dion has a weak self-identity and this GET is described below.

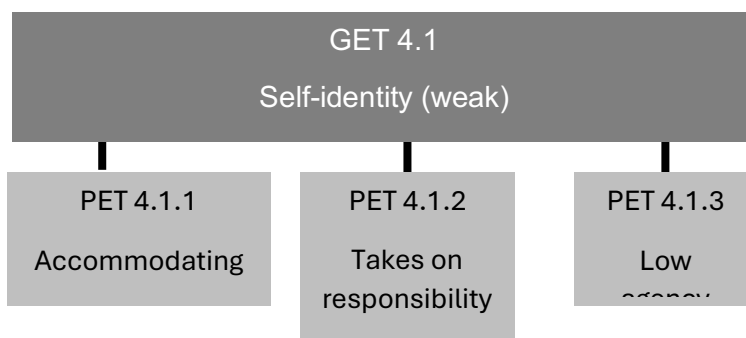


Figure 41

Group Experiential Theme for Dion: Self-identity Weak

4.24.1. PET 4.1.1: Accommodating

Dion describes himself as too accommodating. He wants to help, to have a positive contribution and to be a ‘doer’ but he has low agency and an external locus of control, seeking external validation. He sees himself as an introvert and does not engage easily with others.

“I generally like knowing what people are up to but in like that kind of controlled (way), it is the typical sort of introverted way” (TP2, 11:35,117)

In Dion’s own words he is too accommodating. He balks at what he perceives as arrogance of others, who do not fit in.

“Maybe I am just too accommodating (laughs)” (TP 3, 14:7, 29-31)

4.24.2. PET 4.1.2: Takes on responsibility

Dion holds a narrative in his self-identity that he must show support. This plays out in his home life and his professional life. Dion shares that he wants to not be distracted by outside work priorities as this goes against his grain of wanting to show support, at home. Dion expresses that he has not been there for his family and not fulfilling this parental role fully, but even more so that the family did not even notice his absence.

“I get told well you are hardly here so we don’t notice when you are not here” (TP1, 8:14,19)

4.24.3. PET 4.1.3: Low agency

Dion expresses how his challenge is not prioritizing and planning work which then prevents him from helping enough at home. He compares how much easier it was in his old job when he was more available to look after the kids. It is not in Dion’s diary yet, but he thinks he must just get it done to plan his work better. Dion sees how his self-identity and leader identity carry across the domains of work and home and how the inter identity dynamics result in identity work. In Dion’s case this inter identity dynamic keeps him in a loop of non-delivery in his perception in both domains.

“I am hearing it on my wife’s side as well... I have not helped enough ...And it is not fair that it is her ... so ... I must just prioritise the stuff that will add value to me ... It is not in the diary yet but I think I must just get it done. (TP2, 11:30, 96)

4.25. Discussion from Dion’s findings on GET 4.2: Leader identity weak

The findings illustrate that Dion has a weak leader identity and this is outlined below.

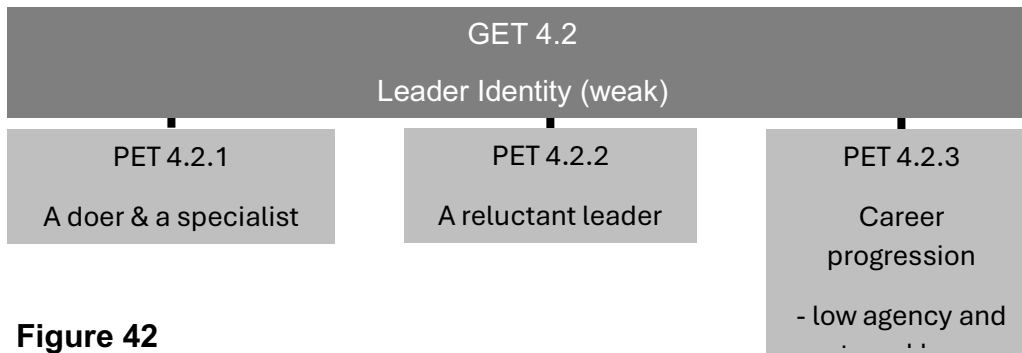


Figure 42

Group Experiential Theme for Dion: Leader Identity Weak

4.25.1. PET 4.2.1: A doer and a specialist

Dion describes himself as a doer, not a strategic (thinking) leader. He is the doer and wants to deliver. Dion wants to help and takes on responsibilities and tasks assigned to him, and he must comply and deliver. He does this to the extent that he works in dual roles at any time: he completes work during strategy meetings, he does work on the plane and train on an overseas trip, he holds onto a part time role as managing director alongside another fulltime job, and he holds a lengthy handover role in addition to holding his new role with a larger team.

“I was still seeing myself as (I) must contribute by delivering, the thinking boss is sitting in the meeting asking me to give him stuff and my job is to give him stuff, ... I was building a different brand I think, I was trying to do that delivering execution but missing out on the stuff that matters, like the thinking, the strategic” (TP 1, 8:31, 32)

Dion has a weak leader identity and in a previous role he held in conjunction with another role he says:

“I knew I wasn’t filling the full MD, the way they are supposed to be really leading actually I didn’t have the time... it was that constant switching between thinking like a leader and then thinking like a doer” (TP1, 8:33,34)

One thing Dion is clear of is his identity as a specialist. Dion is most comfortable as a specialist. Although this does bring fraught identity work for Dion, he sees that he is boxed into this identity by the company. Even though he wants to step into an oversight advisory role, he says he still needs more technical knowledge in his new role. Dion does not see his expertise nor long tenure as a strength.

“I think it was holding me back from my next step because they kept on looking at my CV and saying well you’re a specialist” (TP1, 8:6,7)

“Some good choices I made back then ... from managing a small team to managing a bigger team eventually to becoming a specialist again... I ended back in a specialist role” (TP1, 8:4,5)

“I was ready for a change...I got stuck and I missed ...then it counts against you, people start seeing you as specialist in that field” (TP3, 14:10,43-47)

Dion compares himself negatively to seeing others grow – he sees himself as lesser than. So much so that he even says it is just being like slaves doing the work and not just being seen as the helper. Dion’s frustrations are coming through here as he wants to deliver as a leader but is stuck as a helper, a doer, and perhaps even a slave to others.

“So we want to be the one that keeps on being on the front foot, like we must be driving the agenda and not just being the slaves doing the work” (TP3, 14:29, 127-130)

4.25.2. PET 4.2.2: A reluctant leader

Dion is a reluctant leader and is challenged when confronted with leading a larger team.

“I think these are challenges I didn’t have to deal with in my old job. I mean I had to worry about my one person and it was a lot easier” (TP2, 11:24, 75)

He is not ambitious and is cautious about his capacity and even willingness to even stand in for his direct manager. He resonates with a prior assessment that describes him as the person getting things done and contributing – the doer. So as much as Dion stated that there is a shift in his leader identity narrative, he holds onto the narrative of himself as a specialist, and a doer, a contributor.

“The description they gave in one of my assessments was that sort of second right hand man to the leader, I am the one making sure that he has got everything that is needed...I am not necessarily the one who wants to be in the front but I want to be part of the team, so my value is I can get stuff done that makes the leader look good and I feel like I am contributing.” (TP1, 8:25,26)

Dion is in a new role leading a larger team and he has accepted that he will do an extended handover to that job incumbent, which means he holds two roles concurrently for a number of months. He partially blames this handover for not focusing on his new team. He believes he could not say no:

"I do get the sense that my team wants more of my time because .. I think they felt like in those early days I was very split. I don't think a lot of them will understand...you don't carry old baggage with you when you change companies; whereas I have done an internal rotation; you can't say 'no'." (TP2, 11:5, 16)

"So I try and make sure that if there is a request for support, I am probably biased towards 'yes' giving it. (TP2, 11:33, 106)

He takes on responsibility assigned to him by others and believes he works to do the best he can in the role. And he also states that he would have done things differently if he could have, since he believes the external factors distract him, even though he is compelled by his self-identity driver to support, to help.

"(W)hat I would have done differently is to maybe shut the old job faster or not have had that handover. ... But it was a circumstance thing, my replacement wasn't really up to speed yet." (TP1, 8:17, 21-23)

"But I think also then not being distracted by outside priorities. ..I got pulled into some meetings where they needed some help ... and I figure yes, that is my job, I must support them. I can't say 'just deal with it, you know the people' – I must go there and show support." (TP2, 11:31,102)

Dion is insecure in his current role, as he received negative feedback from his team and compares himself to the team's previous manager and deems himself lesser than.

"The team said it was the worst year end they had been through ... I kept on saying to them tell me if it is me, if you are missing your old established structured boss who knows how to do stuff" (TP1, 8:16,21)

"I think just probably not confident enough in my knowledge that this is a large role" (TP1, 8:34,36)

Due to Dion feeling insecure, and holding a weak leader identity, along with a low agency and an external locus of control he does seek external validation. Dion is cautious around creating an impression of himself as a hard worker, as an approachable, and as a supportive leader. He expresses that he wants to shift away from his identity as a specialist to a leader, although this does not bear out in practice.

“I was obviously trying to do my best to make a good impression, not show them just because I don’t know something that I am not going to do well here, you guys are going to respect me and I have got to earn your respect” (TP1, 8:27, 28)

“I would tell them as I was leaving, ‘I have got to go and see the other job – I am not a sciver’ – because I think they got that impression! Ja! Like government hours you know?! So I was always very careful what impressions I was making, because it kind of sticks. But ja, now I am often first to arrive, last to leave” (TP2, 11:37,22)

“I think I have created a persona that works in this environment ... it’s like I am a leader, not a specialist leader” (TP2, 11:37,26)

4.25.3. PET 4.2.3: Career progression – low agency and external locus of control

Dion has a low sense of agency and external locus of control in his leader roles and career progress. He thought he would leave the company after a few years but ended up staying for 23 years.

“I have been at CoM now for twenty-three years now ...I always felt like that would be the start of my career and then I would go elsewhere and then at that point they would rotate us every three to four years, it was a very structured program, not to exact areas” (TP1, 8:1, 5)

“Um shoo it’s been a long road, I mentioned earlier I haven’t really had timelines planned or goals set that are very clearly defined but it’s been about giving my best in a role.” (TP1, 8:18, 25)

“So I think two or three years ago there was nothing clear about where next to go ... I was, but I think this one was even talked about two years ago.” (TP1, 8:26, 28)

Dion does hold regrets for not stepping into a more strategic identity in previous roles, that have also held back his identity as a doer, not a strategic leader:

“When you look back in hindsight you could kick yourself like you had that, you were invited to the table and you just didn’t use your opportunity...in hindsight I shouldn’t have run away.” (TP1, 8:35,38)

“That is probably where I missed an opportunity to really get stuck in and I possibly could have made a really strong play for the role when he got promoted but at that stage” (TP1, 8:32,34)

“I never took advantage of that as much as I should, ..., I ended up doing work in those meetings for him to get stuff done ... rather be in the discussion listening, trying to contribute ... and I think I destroyed my brand a bit...I had only half been listening and I had nothing to add, so it’s just me as a doer not a thinker” (TP1, 8:30,30)

Dion does want to be different and to be seen differently as a leader. He is beginning to craft a preferred future leader identity narrative, one which is different from his previous leader identity in which he was the ‘doer’ and the expert. He correlates his identity with his role. Dion is using some insights from the management development programme and even then, is uncertain in his language. He wants to step out of being the expert and the ‘doer’, to lead, to develop his team, to have a plan, and build confidence that he knows what he is doing.

“I used to do a lot myself in the old role, so here it is about if I am not planning better and helping them with resources at the right time, then I am not doing my job; ...I am using the opportunity of the new role because I don’t know everything, I can’t do everything.... I like that I have got an opportunity now not to bring my baggage with me, that I won’t be tempted to be doing the late-night slides and ‘don’t worry guys, I will be the last in the chain to save the day” (TP2, 11:18,56-60)

“So I think it is trying to create the mindset that I am not just doing; I need to be kind of setting up a future and make people want to get there.” (TP2, 11:40,143)

Dion does speak to his coach on the management development programme about needing planning. Even in this session Dion states that he thought they did not manage the time well enough. The language Dion used is vague – ‘visionary stuff’, kind of leave the team. The need to structure his time with his team was raised. He wants to sit down and play chess with his team to figure out options and know if anyone is looking to leave so he can plan ahead. The metaphor or chess is interesting as it implies a game with his team in which the moves are not known and the king may fall.

“So the coaching was a prompt and we are trying to structure my way ... ‘I need to do more of this visionary stuff’; I need to kind of leave the team with ‘here’s where we are going, this is where we are going’, and almost have a regular check in.” (TP2, 11:11,34-36)

“I mean I just want that time now to sit down and start playing chess with my team or figure out what options do I have in a year’s time, who is looking to move.” (TP2, 11:24,75)

Dion faces tension between wanting to relinquish his leader identity as a specialist, such as in his previous role, with wanting to acquire new leadership experience in his new role. As a leader he wants to let go of doing the actual work, being the ‘doer’, the ‘slave’. He concludes he wants to prove that it is possible to be both – a specialist and a leader. This is at odds however with his self-identity which as a driver wants to help and support. Dion experiences the tension within his inter identity hierarchy between the dominant self-identity and the past leader identity and aspirational leader identity.

Being a technical specialist has meant for Dion that he has been able to help. He wanted to get exposure to leadership and people management and even in saying he can do both, he still premises this with depending on the needs.

“So I think I have managed to shift my specialist... you know I definitely don’t think immediately ‘I should do this myself’... I tell the guys ‘okay, I need it by this date and I will do a minor review’ ...; I could stop being a specialist and prove to people that I can do both, depending on the needs.” (TP3, 14:33,148)

Yet in practice Dion has not released his role as a helper and hence a doer. Even on the overseas trip which was a part of the management development programme he is doing work in transit.

“I managed to do some work on the plane over, send off stuff from (country), because I decided I would buy their Wi-Fi ... and on the way ...we had a four-hour train ride and I managed to do the next review there” (TP3, 14:1,5)

Dion believes there are limited opportunities for his career progression.

“I can see it’s a tough slog, there don’t seem to be that many opportunities to grow in the building anymore you are getting a bit sort of limited with your sort of higher opportunities” (TP1, 8:23, 26)

“I eventually figured out that maybe my next move isn’t up but sideways to build experience, ... I applied for a lot of GM roles ...I then woke up to the fact that there are skills that you need ..., I am not giving up on the next level but realistically I am going to get myself ready and if an opportunity presents itself I will be able to take it, ... there

are circumstances, younger people are coming through, the world just moves on and you are not thrown out yet in your mid-forties” (TP1, 8:24,26)

Despite identifying the need for himself to build skills, Dion’s learning levels are low. Dion states he wants to do things differently as a leader but does not align his learning opportunities with this. His levels of learning are low, with a low learning goal orientation.

“I think for me personally nothing I came across on this programme now has been completely unique – some of it has been very interesting, the perspective, but sometimes when you sit in the corporate world we very rarely actually take the time to sit back and appreciate ... learnings or techniques or whatever you want to call it.” (TP1, 8:39, 204-208)

4.26. Discussion from Dion’s findings on GET 4.3: Not got to leadership stuff yet

In this GET the findings illustrate how Dion is not getting to his ‘leadership stuff’ yet.

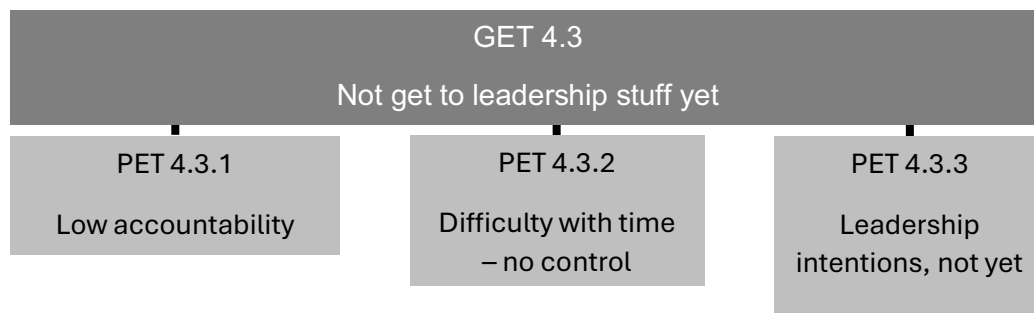


Figure 43

Group Experiential Theme for Dion: ‘Not get to leadership stuff yet’

4.26.1. PET 4.3.1: Low accountability

Dion does blame external factors such as busy work cycles or holding two roles as being the cause for his poor performance as a leader, which reflects his low agency and external locus of control. This reflects too that he has not embodied his leader identity, which would in essence mean taking on responsibility and taking on the identity as a leader for himself and his team’s delivery. He shared that he said to his boss that he felt completely at sea. But he

blames being busy and not able to get his head around everything, and things just fell apart a bit.

“(W)ork just kept dragging on ... and I think I never got a chance to sit back and (think) this is how I want to plan the way forward’ – we were always just pushing and finishing off stuff.” (TP3, 51-62)

“I was definitely in catch up mode, and not taking control of the team’s structure and direction. ...I said to my boss I felt completely at sea a bit. I needed to get my head around all the things that are going on ...and things just fell apart a bit” (TP3, 14:14, 65-66)

Dion expressed that he wants to be more structured in his plan and reporting and accountability with his manager. Dion can see he gets ‘pulled’ but other things and even this intention he has gotten distracted from.

I almost want to ... approach him ... and say ‘this is what I committed to last month, this is what hasn’t happened yet’ ... I probably do need to rein myself in a bit, otherwise I am going to get pulled. I do easily. Friday we got distracted into a whole bunch of things! (TP2, 11:14,45-46)

Part of holding himself accountable and his team accountable would be if Dion has structure, to his and his team’s work. The contradiction is that he does not have structure, and this may be partially because if had had this he would then be held accountable to the structured commitments. The looser the structure is, the less he can be held accountable to and the less he must hold his team accountable to. And this despite his team members asking him for more structure. A blind spot for Dion is that he says here he has no ambiguity about his role yet he states he was at sea a bit and things fell apart. He says he dislikes paperwork- and so the cycle continues – no clear paperwork provides less chance of being held to account, which allows for ambiguity, and enhances the likelihood of non-delivery, from him and his team.

Dion adopts a protective leader identity response is to keep the performance contract at the high level – to a bunch of key result areas, as a way to try to avoid non delivery. There is a tension here and a willing blindness for Dion to see the dynamics as they are. He does not have a documented detailed performance contract and neither has he set these up with his team, and he belittles this as wanting a ‘love language’, as opposed to seeing it as integral to the role of a team leader.

“I don’t have a performance contract at the moment because of me, not my boss... I mean I’ve got no ambiguity in my role, and I have always struggled with paper work ...

I mean as long as I know where my boundaries are, and what my boss expects from me, and I haven't felt lost at all.

So my team at the last team meeting ..one of them made the side comment about 'how can we do mid-year performance management and issue ratings if people don't have contracts?' ...So what I am hearing is that some of them want that, and if I am not giving it to them then I am not speaking their love language or whatever! (laughs)" (TP2, 11:8,22-26)

"I feel like I am not being held accountable enough. And so because my nature is not to do it too, I am also quite liking the flexibility." (TP2, 11:13, 42-43)

Dion is conscious of his gaps in his leadership and his leader identity is salient, and weak.

"I am very conscious of how things are in the new area and how I am being perceived." (TP2, 11:2,8)

Dion is aware, for example, that he has not set a direction for his new team – he has not stepped into his leader identity and role as a leader of this team, even more so he blames externalities such as meetings being put into his calendar. He cannot control his diary, let alone his team.

"I need to start owning the direction of the team,... about two weeks ago I felt like I needed a bit of a step out do some thinking because at the moment there was too much flying around ... so that is the part that is frustrating...so we feel like we are about a month behind,...it just disrupts the flow because meetings get chucked into available slots and you can't manage the diary" (TP1, 8:28,28)

"Maybe I am not doing enough, you know I don't know, I just feel like I have got a few things I am juggling still but it is just that I am always thinking 'am I doing the right thing'." (TP2, 11:36,11)

"That whole thing of the monkey is on the back or getting pulled down to the wrong level. ... I am always conscious about is this something I should be. I do probably feel I go to a few too many meetings, that my team probably (could)." (TP2, 11:32,104)

Dion faces a dilemma and inter identity tension. His being helpful has been based on his technical knowledge and this is the way he knows how to lead – to be helpful as a specialist. He believes his credibility and external validation comes from being a specialist. Dion grapples with releasing this as a cornerstone part of his leader identity.

“Because I think part of my work on my technical skills is to kind of build credibility with the team because I don’t want people to say, ‘what is he actually doing in the corner there?’... There are a few specialists that you help put together, but you know I am always ready to help them through a problem.” (TP3, 14:27, 114-117)

4.26.2. PET 4.3.2: Difficult relationship with time – no control

Time becomes the metaphor to express his sense of control and loss of control. One way Dion expresses this sense of having no control, having an external locus of control, is through sharing how time shrinks and how he runs out of time for all his work. He shares how he wants time (to plan, to think, to meet his team, to read) as a way of expressing he wants control, but just does not seem to get it.

“But I think it has been about finding the time. ... ‘I am giving up quite a bit of time with you, we haven’t spent this long together before’ – hopefully they can see that I am in this for the long haul, I am not just doing it as a job” (TP3, 14:17,73)

It seems like Dion’s need for time is indicative of his need to feel more in control of himself and his environment, and the loss of time seems linked to a sense that he is not in control. Dion tries to reclaim his control by setting intentions to schedule times with his team, but even this he can’t manage as others schedule meetings. He has low agency and has a sense of repeatedly not getting to it and being behind. He wants to schedule reading time and thinking time and does not get to it.

“But also trying to avoid making excuses that time is always short, but it is what you do with it. ...I said I feel like I need more reading time, I am not doing enough reading. ...So I must make time... Of course now that I have said I am doing it, I haven’t done it yet.” (TP2, 11:27, 90)

Dion expresses having no control over his time and is dependent on those and factors impinging on his time.

“And the thinking time also, I think the team, they have a different time in the office, I have noticed they prefer to come in later, by design I come in earlier after the school run so actually I get this hour of space” (TP1, 8:13,17)

“A one hour meeting with one of my team turned into a 2.5 hour ...I should have kept it to an hour” (TP2, 11:15,48)

“But I haven’t been able to commit enough time to some things where stuff starts piling up and I feel like I am already stretched on a daily basis” (TP3, 14:35, 150)

The lack of control over time is preventing Dion from doing those activities with his team to build credibility in line with his preferred leader identity, he needs time to do these things but does not quite get to doing them.

“I am trying to inspire them and build my own credibility, but I am not quite getting that I think, ‘where are we going, please follow me to the battle ground’ – you know? I am not quite there yet!” (TP2,11:38, 128)

“But what I have actually done is I had a team meeting, two people can’t attend – so I decided I would cancel it but leave the room where I had booked ...and do an hour of that kind of planning” (TP2, 11:7,20).

“But I need to spend more time on our longer-term planning .. I actually had plans yesterday, instead of going to the movie I was actually going to work on this you know, this thinking stuff... and it just didn’t quite happen!” (TP2, 11:6, 18-20)

Dion has low agency and no control over his time as he enters the workplace in the mornings. He chooses to engage with some team members as he comes into the office. Even then he is unsure and is seeking external validation of his choices. He does not recall the team members’ names and mixes them up, even though he always has the list of names in his pocket. He is missing his foundation of time for himself at the start of the work day.

“I mean my preference is to walk in in the morning, basically tunnel in straight to my desk and just get on with the day. (laughs). Then you obviously know what that perception is – so I make sure I walk ...there are one or two juniors often in, I make sure I go past and greet them. ... I was struggling to remember all their names.. I actually started writing out everyone and I had it in my pocket the whole time so I could remember!” (TP2, 11:34,111-113)

“So because I am feeling a bit all over the place; ... then when they come into the office ... I mean it is open plan, you can never actually control the flow... I do feel like I am missing the foundation, or the thing that gives me that calmness (TP2, 11:29, 94)

4.26.3. PET 4.3.3: Leadership Intentions, not got there yet

Although time slips away Dion does have some intentional plans in place around his role as a leader

“I got this great list..., getting some time lines on to it ...I am looking at the 11 October, that is my planning.” (TP3,14:15,68)

“My PA getting dates in the diary and then booked for our planning conference...So I think by setting up this plan in advance we actually have got like a structure building up and I know we are going to take care of a whole bunch of things through this process.” (TP3, 14:30,131-141)

“... that why you have a vision, why you have a strategy, and how you actually implement it ... Because I know if I actually structure my time with him as well and go ‘here’s my ten deliverables for the month and here is my previous report’ and it is simple.” (TP3, 14:16,70-71)

Dion appreciates learning and had decided that he should develop to ‘step off the train’ and make some changes.

“I was doing too much and I had to work out a better way, there never seems to be a way to like step off the train and like redefine scopes and stuff, so you just try and create your space all the time, but it is just always shrinking, you’re thinking time is just gone...but still I can structure things a little bit better” (TP1, 8:11,13)

There are plans that Dion has not yet actioned. Dion is conscious and his leader identity has salience at this time point. He is wanting to make a conscious decision switch into his aspirational leader identity. He sees that he would start something, feel uncomfortable and let it go. And he sees he loses power this way, is ‘toothless’. He started a new formal recognition programme for his full team, and we remain to see if it goes anywhere else, and Dion does not know if it went well.

“Like actually make sure you give it a good go, a conscious decision switch it. Then they will see you are basically toothless. And I have tried to start something like that in the team, like a formal recognition. I put it out last month. ... So I don’t know if it went well” (TP3, 14:38, 164-167)

Dion intends to hold a strategy review session with his team, and what will hinder it is time. Dion does see that he would undermine himself if he cancelled it.

“I just need that stake in the ground. Because I think by creating these kind of milestones, I am forced to just like adapt you know; there is a deadline, I need to meet

it. So what will hinder it is time, ... if I cancel this thing then it undermines myself. So this is going ahead, even if I have nothing” (TP 2, 11:41,145)

Dion attributes his realisation of the awareness of needing a clear strategy execution plan to his learnings on a class in the management development programme and seems committed to doing so. Even in this he vacillates about his timeframes for the review. He does structure when he needs it not because he likes it.

“I do structure when I need it but I don’t like doing it. And then (the lecturer) was on the course on strategy and he made a big point about that whole 30-day action plan ... (and you) can’t just dabble in it, you have got to put energy into it, I mean if you do it for 3 to 6 months it is then ‘stop’. And the guys realise ‘oh, so there are no consequences...and then you kind of lose that credibility.” (TP2, 11:12, 38-40)

Even when Dion does have a review session scheduled with his team though he does not have structure to it, there is no agenda or approach or way of holding him and the team accountable.

“I don’t quite have an agenda yet so that was the weekend work, but I need to basically just check in where we were and of the list that we generated at the start of the year, where are we likely to land by year end and what must we defer.” (TP2, 11:39, 130-137)

Given the self-identity and leader identity dynamics it is no surprise that Dion is triggered by three potential leader identity triggers: hearing a team member is applying for jobs elsewhere, hearing of a potential retrenchment offer, and getting a below average performance review. With low confidence and a weak leader identity, low agency, low accountability, and external locus of control, in each of these instances Dion feels threatened and diminishes his leader identity further.

Dion has appraised a trigger as a leader identity and that is of hearing of the potential resignation of a team member. He has not approached the team member directly about what he has heard, and he has avoided engaging directly with her.

This event has triggered Dion to consider his leader identity in questioning his awareness of the state of his team, his expectations of himself and his questioning his validation from his team, the role of team members, his role as a leader to bring vision, strategy, structure and how to engage his team, and in setting direction. His leader identity becomes salient in this experience. It remains a weak leader identity as he is unclear about himself as a leader and is vague in his desired or preferred leader identity. He even states this is not a communist and

he is not going to kill someone for going against his views, showing how upset he is and how extreme the situation seems to him, that he was not aware, he was not approached and could not prevent this from happening. His lack of agency and external locus of control and need for validation is highlighted in his experience of the identity work. His self-identity is to want to help and support and when he does not feel in control or able to play this role with this new team.

“I am dealing with the resource planning issues ... I am worried about keeping this team together; there is no reason why they should be leaving so soon.... And I have already heard there is one that is applying for jobs elsewhere, but I heard it in confidence so I now have to sort of tread carefully on that one.” (TP2, 11:3,10)

“I was like ‘ugh’ you know? Just on top of everything, I won’t have an intact team by year end, so I need to now worry about recruitment. Ja, it was just more now I don’t have time to solve it and if I had heard about this three weeks ago I would have been able to start talking. ...But again, it is just like if you have the information you could work it into your plans. But when it is a surprise...” (TP2, 11:23,73)

“And so this person applying for a job behind my back, I am only annoyed not because I want to hold her back... I was thinking in a year’s time we would start looking at an opportunity – but in a year’s time, not now. ..., but I mean the point is she didn’t come to me straight away and say, ‘I am thinking about this’ and I would have been open to talk” (TP2, 11:21,67)

“I mean this is not a communist, Soviet Russia, where I am going to kill someone for going against my views! So anyway...There was something about her doing it behind your back and not coming to you first” (TP2, 11:22,69)

Coincidentally Dion does know at this time point that the results were not good from his team engagement survey. He does not experience this as a trigger. He is in avoidance, perhaps denial at the stage of his team, and blames the one person leaving for bringing the score down and for not proactively addressing her source of grievance.

“And then I picked up vibes that obviously she is the one that probably did make the comments about the performance contracts. So she clearly likes the rules and the... And she is very good at planning with her team, ...So I am thinking well if it has been such an issue why were you not on me before you know? I might have prioritised it above something else.” (TP2, 11:24,75)

Dion feels insecure in his current role, that he is not earning the credibility he wants from his team and that he is 'a bit' behind in his current role. This feeling insecure is compounded by a trigger to Dion, the rumour of potential voluntary severance. Dion's boss calls him in and he kept waiting for the bombshell to drop.

"So I mean there is a little bit of noise in the system at the moment about voluntary severance, it was an offer made to the finance staff about a month ago, ...if you want to take the option – and I mean I wasn't interested, but I was kind of half interested..., my boss came for a quiet chat in the corner, like off the record, and I like kept waiting for him to drop the bombshell like my job is going to Joburg or something like that. ... I mean retrenchment always feels like a threat at some point you know, it is just one of those things, I feel like I've crossed my 40s, you become in the firing line for restructuring. Transformation is a challenge." (TP2, 11:42, 150-160)

Dion does feel review this event as a threat, as a trigger to his leader identity. He views himself as having limited career opportunities as he raised at time point 1 which is now exacerbated given these rumblings of severances and restructuring. Being white male and over 40 years old is a defining feature of his self-identity and professional identity. He does diminish the threat stating it is a little bit of noise and that he has hope and a future, nevertheless. However, the impact on his leader identity and role is that there is greater pressure to deliver, worry about delivering what I need to deliver.

It is also no surprise too that Dion has not improved his performance. He states that he did not have a great mid-year rating. This is the first time Dion has rated himself below average in his entire career and this is jarring against his long-held belief about himself that he 'will deliver'. He also sees that the team will not deliver to their performance targets.

"Ja, so I didn't have a great mid-year rating because I basically got the slightly below delivering – which I kind of thought about myself, during the year I had been distracted by a lot of the job and trying to close out stuff, and I hadn't fully got to grips with people part." (TP3, 14:11, 49)

"I obviously had to step back and say could I honestly say I delivered to the standard that I was expected to deliver to. And so that was a bit of a 'ooh, that was the first time I have actually down-rated myself to below average'. I can't remember, I actually went back through my history and I actually couldn't find the last time. Because I always see myself as a 'I will deliver you' side" (TP3, 14:18, 76-77)

Dion's response is to talk defeatist and to conclude the year in his mind. He sees the year as a transition year for him. Ideally, he wants to have gotten to grips with his role and start the year well. This represents being in liminality, in his mind, betwixt and between, not having performed well in his current role, he seeks to start well in the new year. He is stuck and has a diminished leader identity.

"I feel like I have had a few negatives, because my goal was not to lose anyone and then I have lost people. ...Ja, I feel like this was my transition year and I am really going to get to grips with the place next year...That's why I am really talking defeatist and I have drawn the line for the year and it's nothing we can do about the last nine months, we are not going to get through our performance plans, but let's just make sure next year starts well." (TP3, 14:34, 154)

Dion is conscious that he is not performing his leader role well and is conscious of his gaps and weak leader identity. Dion diminishes his leader identity when confronted with what he experiences as a leader identity triggers as he does not see ways he can redress or control the situation. Dion does not have clear career aspirations nor a clear leader identity. He is 'speaking defeatist' and is feeling less positive than when he started in the role.

Dion reflects on needing direction from the top, stating that this is a leaderless world that causes one to question 'why would I care'. Dion reveals an attitude at the third time point of an underlying hopelessness and despair as he was talking 'defeatist'. He questions whether he is in the right place and if he is actually getting what he wanted from the role.

"I suppose you always sometimes look at yourself and go why would I kill myself if there is no direction coming out of the top... so like maybe this leaderless world is going to make everyone go 'why would I care' when it is actually not going to be like that. I am not feeling that now but it does always make you question am I in the right place, should I ... am I still getting what I wanted out of this role, which was grow my leadership skills, grow my technical knowledge" (TP3, 14:26, 106-111)

Dion says he did make the right move to this new role, so his narrative is not internally consistent or coherent in this time point, indicative of the identity work and tension he is experiencing,

"I was ready for the move, the course was a nice way of transitioning it, and ja, the reflections along the way, the questions. I think I am surviving. On this side of the team we are mostly intact, because again, I am not feeling like I made a mistake, ...And so it was just that initial three months that was very weird." (TP3, 14:41, 180-183)

Dion shares some potential intentions in shifting his leader identity, and this remains to be seen if it is enacted. At this timepoint Dion is experiencing the disappointment and frustration of not delivering and feeling despairing about state of his leadership, leadership at the top, perhaps a reflection of himself not giving his team a sense of direction and not having a sense of direction for himself. He does not have clarity as to an aspirational leader identity and his self-identity continues to be salient and dominant to his leader identity.

There continues to be a dynamic interplay between the self-identity and the leader identity and Dion expresses these tensions and contradictions between aspired and lived experience as a leader. He is not getting to his intentions and his leader identity has not developed. It has not shifted in the inter identity hierarchy and remains weak, if not even further diminished. His response is that he remains stuck, in identity work. In sum, Dion does not experience leader identity development over the time period.

4.27. Integrated discussion from Dion’s findings – shifts over the time points

Dion has a clear trajectory of the dynamic interchange between his weak self-identity and weak leader identity over the time period, which results in a stuck pattern, and no leader identity development.

DION OVERVIEW OF FINDINGS

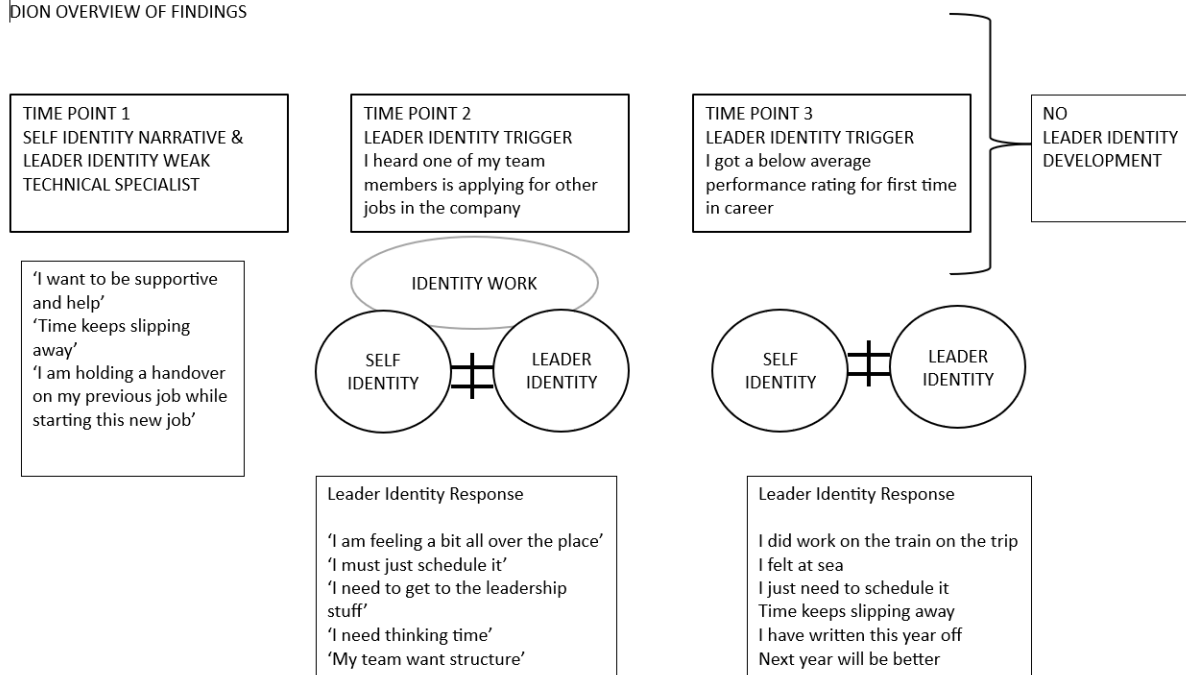


Figure 44

Dion's Leader Identity Work over the Three Time Points

This figure outlines the triggers, identity work and responses at each time point and over the time period.

From time point 1 Dion displays a weak self-identity and describes himself as perhaps too accommodating. He wants to help, to have a positive contribution and to be a 'doer' but he has low agency and an external locus of control, seeking external validation. Although Dion strongly identifies with his self-identity as accommodating and a helper, he does not have a clear or developed self-identity narrative or firm sense of himself.

As a leader, Dion is a reluctant leader, sharing he is happy to not step up front, and to help the boss look good. His leader identity is weak and ill defined. He is most comfortable when he can deliver and provide support as a specialist. His leader identity has been associated with being a specialist. He takes on responsibilities assigned to him: he does work during strategy meetings and does not contribute, he does work on plane and train on overseas trip, he holds a part time role as managing director alongside another job, he holds a lengthy handover role as he steps into his new role as a leader of a larger team. He accepts the job rotation system in the firm feeling obliged to move and this latest move leaves Dion feeling at sea a bit in his new role leading a larger team.

Dion has no agency or control over how he is leading this current team. Losing time and having no control over time is a strong metaphor for Dion not having control over his leadership nor of his leading his team.

Dion is conscious of his gaps as a leader and he sees that to perform as a leader of a team he needs to set direction, to structure the work plan and performance contracts, to engage his team, to be strategic and execute on this. However, Dion does not 'get to this'. He wants to shift out of his 'doer' identity and into an oversight advisory role, yet he also says he needs more technical knowledge in his new role.

This is an irony as much as he expresses he wants to shift in his leader identity, he draws comfort in being associated with being a specialist, and doer. He regrets not making shifts in earlier roles and regrets that his reputation has been boxed as a specialist. But his learning is low and ambition is low. And he expresses having no control over this.

One way Dion expresses this sense of having no control, of having an external locus of control, is through sharing how he has no control over how his time. His time seemingly shrinks and he runs out of time for his work and for his key roles as a leader. He shares how he wants time (to plan, to think, to meet his team, to read) as a way of expressing he wants control, but just does not seem to get it. He has no agency and an external locus of control.

There is tension by time point two between Dion's self-identity and leader identity. Dion sets Intentions but these are not yet met. Dion wants to step away from being the doer, to being a leader. His self-identity narrative sticks as he errs on choosing to help others over focusing on his role as a leader. He intends to hold onto being both a specialist and a leader identity. This tension plays out in ongoing identity work through the time period.

Dion experiences the potential trigger of hearing of a team member applying for other roles as a leader identity trigger. His insecurities and identity work around his leader identity are brought to the fore. For Dion this reflects his poor leadership, his lack of control and a person who symbolizes what is not his strength – structure and planning.

Dion sees his gaps in leadership and a trigger for his leader identity is when by time point 3 he rates himself below average in the mid-year performance review, the first time in 23 years of working for this company. He is not delivering what is required of him or his team. Dion diminishes his leader identity when confronted with what he experiences as a leader identity trigger as he does not see ways he can redress or control the situation.

The future is not clear. Dion tells his manager it will be a very long time before he is willing and able to step into his shoes. Dion does not have clear career aspirations nor a clear leader identity. He is 'speaking defeatist' and is feeling less positive than when he started in the role. He is also feeling threatened by voluntary severance packages being offered and at his age believes his options to be limited. It is not clear how Dion's career or leader identity will unfold. Dion's leader identity does not develop over this time period.

4.28. Integrated discussion from Dion’s findings – experience of the appraisal of leader identity triggers and the impact on leader identity development over time

Dion has a weak self-identity and a weak leader identity. His self-identity serves as a constraint on his leader identity keeping him in the cycle of being a doer and a helper. There is ongoing identity work and tension between Dion’s self-identity and leader identity throughout the time period. The influences are his low agency and external locus of control, as Dion does not find ways of taking control of his time, or his role as a leader of a larger team. He has a low motivation to lead, a low learning goal orientation and is not clear of his future or aspirational leader identity. There is no leader identity development over the time period. This is summarised in the table below.

Table 7

The factors of Dion’s Leader Identity and Self-identity

	Leader identity strength and salience	Self-identity strength and salience	Influences	Self-identity narrative	Leader identity tie with self-identity	Leader Identity Development
Dion	Weak	Weak	Low agency External locus of control Low learning goal orientation Low motivation to lead	Self-identity narrative as constraint	Tension between leader identity and self-identity	No Leader Identity Development

The phenomenon of Dion appraising potential leader identity triggers and how this plays out over time is captured in Figure 45 below.

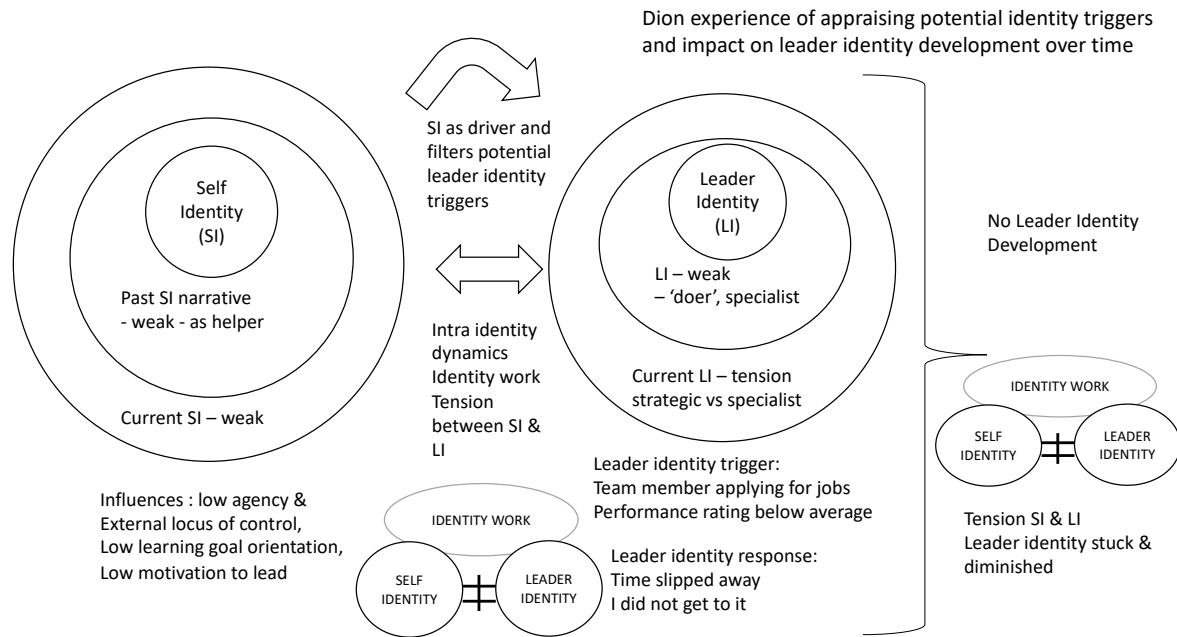


Figure 45

Dion's Experience of the Phenomenon of Appraising Potential Identity Triggers and Impact on Leader Identity Development over Time

The first circle depicts for Dion holding a weak self-identity. There is a tie with his leader identity and there is tension within the inter identity network and hierarchy. The right-hand circle depicts the leader identity for Dion as weak, and stuck as a doer, a specialist, a helper. There is identity work playing out between the self-identity and the leader identity as Dion grapples with stepping into control of his role as a leader of a larger team, and of wanting to be seen as strategic and not only as a specialist, and not only as a doer and a helper.

As depicted between the circles, the self-identity acts as a filter to potential leader identity triggers. Dion experiences the trigger of hearing of his team member potentially resigning as a leader identity trigger. He also experiences his below average performance rating as a leader identity trigger. Both of these triggers have potentially challenged his self-identity as being able to deliver, being a doer, and being a helper, when he can't keep his team together. His appraisal and responses are influenced by Dion having low agency, external locus of control, a low motivation to lead and low learning goal orientation.

The tension between the self-identity and leader identity continues to play out over the time period. In Dion's case his identity work continues and his leader identity remains stuck and even diminished as he cannot step out of being the specialist doer, and apportions the blame

to time, to the team member, to the lack of leadership, to externalities. Dion does not experience leader identity development over this time period.

4.29 Cross case integrated discussion – the place of the LI and SI in the inter identity network hierarchy

The two dynamics at play in the inter identity network, which are the self-identity (SI) and the leader identity (LI), and in either case they are strong or weak. The tie between the self-identity and leader identity are either conflictual or aligned, or non-existent. In these cases the participants were selected as they expressed themselves as leaders signalling the presence of a leader identity, so they all have a tie and presence of the leader identity in their inter identity hierarchy. The tie shifts over the time period as does the relative position of the identities.

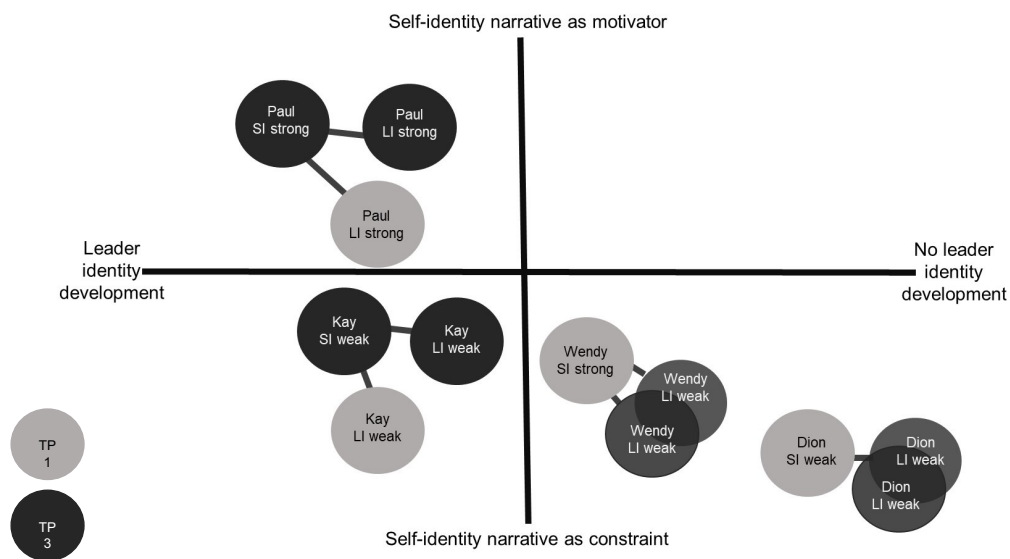


Figure 46

Leader Identity Development in Relation to the Self-identity and Leader Identity Hierarchy

The diagram above indicates the shifts over the time period as well as the result of leader identity responses for each participant. The lighter circle represents the first time point, and the darker coloured circle represents the third time point. Over the time period the strength

and tie of the LI does shift in relation to the SI. In all cases the tie shifts in that the LI becomes more salient in relation to the SI over the time period. So the circle shifts up in the hierarchy, some to a greater or lesser degree. It is interesting to note that the LI may remain weak (or strong) even if it shifts in the inter identity hierarchy. Strength of an identity is not an indicator that there has or will be identity development, nor is a shift in the identity hierarchy an indication that identity has developed.

In all cases the SI remains the primary identity in the inter identity hierarchy. Potential leader identity triggers are appraised through the SI narrative, and the LI seeks to align with the SI narrative. It is not the presence of the SI alone but the nature of the SI that matters. The SI narrative serves as a constraint or a motivator on leader identity development. This is indicated in the diagramme in the vertical axis. The SI serves as a motivator to the LI if the narrative affords an expanded and different LI. The SI serves as a constraint when it has a narrative which has a focused or singular driver which constrains the potential changes to the LI.

Kay for example has the SI narrative that she has to have a positive impact on others, that she cannot fail, that she must prove it is possible. And when this is experienced in a leader context in which Kay experiences the trigger of the 'perfect storm' of contextual economic pressures, her LI responses are constrained by this. She has to succeed and responds by only focusing on the 'controllables'. It is only when she finds alignment in that she believes as a leader she has a positive impact and a negative impact and that in a more senior role she can largely have a positive impact and legacy. Only then does she find a synergy with her SI again, and her LI has developed to achieve this.

Wendy is constrained by the SI narrative that she must meet the status of the level of executive core business, that she must accept these responsibilities. She does not develop her leader identity to lead her current team or find a new narrative for her leader identity in her new role. Although she has moved roles and seemingly to a more senior executive and board level role, she has not developed her leader identity. Her leader identity remains the same over this time period.

Dion has a weak and constraining self-identity narrative which is loosely defined as him being a helper and a 'doer'. This constrains his leader identity narrative to be that too, a 'helper' and a 'doer'. This he can do more easily as he has had a leader identity as a specialist but he is not able to step into his new role as a manager a larger team with a clear identity as a leader who is strategic, has a clear way forward for his team and is able to manage the performance and the cohesiveness of his team. His leader identity is triggered as he hears a team member

is going to leave and is applying for a role elsewhere, and he receives a below average performance rating. His leader identity is actually weaker by the end of the time period.

Paul on the other hand has a SI narrative that motivates him to continuously learn, to reach his full potential, and as such this affords him the opportunity to expand and shift his LI. Paul's LI develops as he experiences himself as a contributing member of the executive, as a strategic leader, one whom guides and empowers his team and is sought after for his advice and input. This represents a shift away from his LI as a specialist, with technical acumen and institutional knowledge as his defining leader identity. The nature of the SI narrative influences the nature of the LI and to what extent the LI can develop.

Leader identity development is indicated in the horizontal axis. In the case of Paul his SI narrative was a motivator and along with the influences (agency, internal locus of control, learning goal orientation, ambition), his leader identity does develop over the time period and the emerging leader identity is enacted. He appraised a potential leader identity trigger as appraised through his SI and did act on his emerging leader identity.

In the case of Kay although her SI serves as a constraint, and her LI is weak, she does demonstrate a shift in her LI narrative. She shifts in how she sees herself and her potential as a leader following an experience and appraisal of a cluster of leader identity triggers. Kay does demonstrate leader identity development over the time period.

In the case of Wendy, her leader identity does not develop over the time period – she remains within the constraints of her past aspirational leader identity and goals and does not shift how she is and views herself as a leader. She does experience identity work in response to a leader identity trigger but does not shift her view of herself as a leader over the period. Her drivers remain the same.

In the case of Dion he has greater salience in his LI in the inter identity network however he does not shift his LI narrative over the period. He does experience intense identity work as he grapples with the tensions within his LI and between his LI and SI and has a weakened sense of his LI by the end of the time period.

There are other influences over and above the SI and LI that play out in the leader identity development over time. In the following section I include a diagram of the inter identity network dynamics influencing leader identity development over time.

4.30. Inter identity network dynamics influencing leader identity development over time

The findings which emerged from an interpretative analysis of the phenomenon of the appraisal of triggers and the impact on leader identity development. From the analysis a framework of the phenomenon became clearer in that the dynamics in the inter identity network, in particularly between the self-identity and the leader identity, are a primary driver of identity work and leader identity development.

The framework as depicted in Figure 47 below is a key contribution to identity network scholarship and leader identity development. This is captured in the framework below which represents the integrated findings from the study of the phenomenon in question – how managers appraise potential leader identity triggers and the impact this has on leader identity development over time. The diagramme depicts the self-identity, the leader identity, the tie and identity work between these, the influences and the leader identity development over time. This answers the primary research question of how managers appraise potential leader identity triggers and the impact of this on their leader identity development over time.

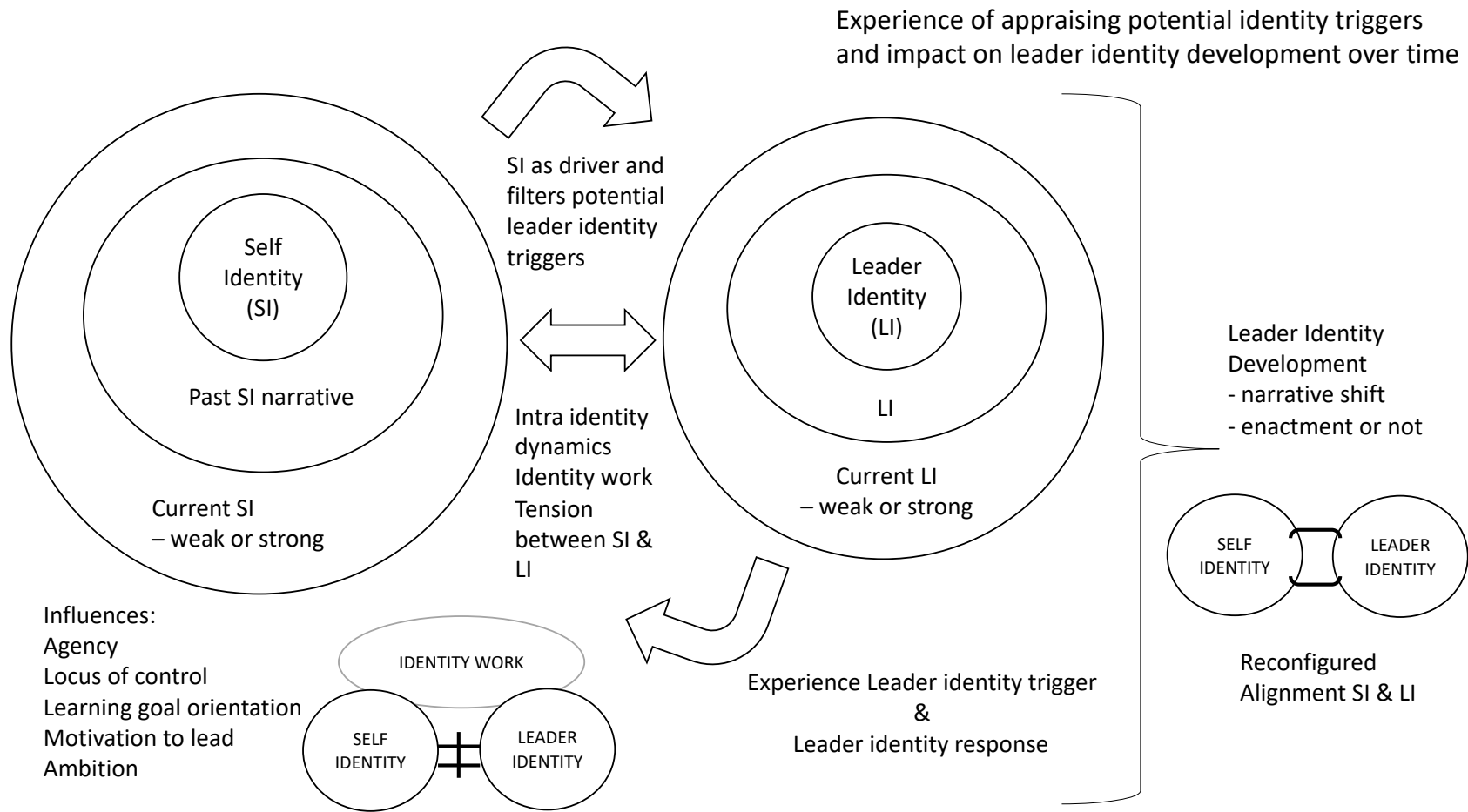


Figure 47

Framework of Leader Identity Development over Time in Response to appraisals of Potential Leader Identity Triggers

The framework of leader identity development over time in response to appraisals of potential leader identity triggers is depicted in Figure 47 above. Here is an overview of the dynamics as shown in the diagramme. The first circle in the diagramme represents the self-identity (SI). This may be strong or weak. There are various intra identities in the SI such as the preferred or least preferred SI, and the past SI narrative. These are depicted like layers of an onion although the relationship is not static between these; there is ongoing engagement and dynamics between the inter identity narratives.

The second circle represents the leader identity (LI). The LI may be strong or weak. The LI too has intra leader identities such as the preferred and least preferred LI, future aspirational LI, past aspirational LI. These similarly are depicted as layers and the relationship between the intra identities is dynamic and constantly shifting.

There is a tie between the SI and the LI where a person holds a leader identity. This tie may be strong or weak. There is an ongoing dynamic interplay between the SI and the LI. The SI is dominant in the inter identity hierarchy in relation to the LI. In particular the past SI narrative plays a key role influencing the leader identity.

The tie indicates there remains the potential for identity work to be triggered between the SI and the LI. A manager is confronted by several potential leader identity triggers on a daily basis. Yet not all potential identity triggers are experienced as triggers for leader identity. Potential leader identity triggers that are appraised as leader identity triggers are done so when the SI is brought to the fore. When the past SI narrative is challenged or threatened in some way, then this potential trigger raises tensions between the SI and the LI. This potential leader identity trigger is then experienced as a leader identity trigger. Identity work is triggered between the SI and LI.

The SI acts as a filter to potential LI triggers, and it is the past SI narrative which serves as the primary filter. The implication of this is that many potential leader identity triggers are blocked or are not experienced as a leader identity trigger. This past SI narrative serves as a motivator or a constraint on the leader identity development. The nature of the past SI matters.

The inter identity dynamics between the SI and LI play a critical role in the appraisal of potential leader identity triggers. This process is often subconscious and the manager becomes aware of these when identity work is triggered. The identity work experience may be anxiety ridden, confusing or clear. This emotive response is not based on a

conscious cognitive appraisal of the potential leader identity trigger. The appraisal of the potential leader identity trigger is a subconscious dynamic occurring when the past SI narrative is triggered in relation to the LI. The leader identity trigger is experienced as such. Then the manager is aware of the identity work and the LI is more salient in the inter identity network. This identity work triggers conscious and cognitive responses to the grappling with the leader identity narrative.

Identity work continues as the tension between the SI and LI remains unresolved. When a renewed leader identity finds a new synergy with the SI then the identity work for then is resolved. When the SI and LI are aligned there is a shift in leader identity narrative. Identity development has occurred as the meaning of the leader identity shifts.

The SI and LI identity work dynamic may explain how the oftentimes conscious intentions of managers to be different in their leadership actions does not play out in a shift in leader identity. For example setting an intention to step away from being the technical specialist to the strategic leader will not occur if the leader identity is at odds with the drivers of the past self-identity.

There are a range of influences which impact the appraisal and responses, and each person has a different configuration and experience of these. So it is not the presence of absence of these factors but how these influence the narrative shift of the leader identity in relation to the past SI narrative drivers. A range of personal drivers influence the SI and LI inter identity dynamics and in turn impact on leader identity development. These influences are as follows:

- Weak or strong agency
- Internal or external locus of control
- Learning goal orientation
- Motivation to lead
- Future aspirational leader identity clear or not clear or ambition

These influences do not determine whether there will or will not be leader identity development. They do influence the nature and content of the leader identity. These factors also influence the way in which the leader identity development translates into career progression. In addition these factors influence the nature of the experience of leader identity development, whether deeply anxiety ridden or whether seamless, if not predictable, inevitable.

In sum, potential leader identity triggers are appraised as a leader identity trigger when the SI is triggered in relation to the LI.

1. The self-identity is dominant in hierarchy of intrapersonal identities.
2. The leader identity is filtered through the self-identity narrative drivers.
3. The past self-identity buffers, filters or blocks out potential leader identity triggers.
4. If the leader identity is triggered through the filter of the self-identity narrative, identity work ensues and the SI and LI are in tension.
5. The past self-identity serves as a constraint or motivator on leader identity development. The nature of the SI matters.
6. Leader identity development occurs as the leader identity narrative is renewed or reconfigured, and when this aligns with the self-identity.
7. When there is renewed alignment or synergy between the self-identity and the leader identity the identity work is resolved.
8. Leader identity development does not automatically lead to enactment of the renewed leader identity.

Identity work between the SI and LI may continue over a time period, and the trigger may be re-appraised over time. A variety of potential triggers may also be amalgamated before they serve as leader identity triggers. When there is tension between the SI and the LI identity work continues. A manager may engage with multiple leader identity triggers simultaneously, and these are in identity work against the SI. The identity work and tension are not resolved until alignment is found between the SI and the LI.

The leader responses vary and may be to strengthen the LI or to diminish the LI, or for the LI to remain the same. For example, Dion diminishes his LI in response to the triggers, whereas Paul expands his LI. The responses of the managers to the leader identity triggers are varied at each time point. What is clear is that leader identity responses to leader identity triggers at a time point do not depict leader identity development over a time period. For example, Wendy responds to the time pressure with an apparent shift in empowering her team, which we find over the time period is a way of countering a weakness and not representative of her changing her leadership in any way.

Leader identity development (LID) occurs when the leader identity narrative shifts in relation to self-identity. LID occurs when a manager sees him or herself as a different or strengthened leader. LID occurs when the narrative of identity as a leader shifts, either

it is reformulated or strengthened. When the emerging LI narrative aligns with the overarching SI the experience of identity work lessens. There is a renewed alignment between the SI and the LI.

When leader identity development does occur, the manager does feel more confident and has a greater agency to act as a leader. Enactment of the emergent LI is not a given though. The influences affect whether the manager acts on the emerging LI, or not, such as agency, internal locus of control and learning goal orientation and having a clear aspirational leader identity.

Leader identity development occurs following identity work between the self-identity and leader identity:

1. There is a reconfigured alignment between the emergent leader identity and the overarching self-identity narrative
2. The leader identity narrative shifts. There may or may not be enactment of the emergent leader identity narrative
3. Leader identity may be weak or strong. The strength of the LI does not impact LID.
4. Leader identity development occurs when there is an aspirational leader identity, and a motivation to lead, although these do not necessitate that leader identity development does occur.

Over time a leader identity narrative may shift but this does not mean there has been leader identity development. It is only when this narrative shift brings closer alignment between the SI and the emerging LI that there is LID. The strength of the LI does not impact this, and there can be LID without the leader identity becoming stronger in the hierarchy. It will be more salient and clearer but may not necessarily be stronger. At different time points there may be evidence of LI narrative shifts and the dynamics shift in the identity work between the SI and LI, and this is not necessarily LID.

4.31. Integrated discussion in relation to literature

The purpose of this section is to discuss the key findings in relation to the extant literature. This section discusses how the findings relate to the literature and will be structured around the key findings around the main research question of how manager's appraise potential leader identity triggers and the impact this has on their leader identity

over time. The findings and analysis highlight points of confirmation, divergence and novel insights gained from this empirical research.

4.31.1. A framework of leader identity development over time in response to appraisals of potential leader identity triggers

The literature states that leader identity development is a complex phenomenon which warrants further scholarly attention and a nuanced approach to research (Alvesson et al., 2008; Day et al., 2014; Day & Dragoni, 2015; Day & Harrison, 2007; Hammond et al., 2017; Ibarra, 2005; Ibarra et al., 2010; Lord & Hall, 2005; Miscenko et al., 2017). Empirical evidence on leader identity development is sparse (Middleton et al., 2019). Scholars have called for further research and empirical work on the wide-ranging theoretical frameworks and conceptual work on leader identity (Epitropaki et al., 2017; Kwok et al., 2018; Miscenko & Day, 2015). Given the role played by identity it has sparked considerable interest and has become one of “the most popular topics in contemporary organizational studies” (Sveningsson & Alvesson, 2003, p. 1163) resulting in a substantial body of knowledge on leader identity (Ashforth et al., 2016; Collinson, 2003; Epitropaki et al., 2017).

However, leader identity development scholarship is new in relation to the broader base of leadership research and theory, and although much has been discovered there is still much to learn (Day et al., 2014). The changing environments and changing demands on managers require a focus on advancing scholarship on leadership practices and phenomena such as identity development facing identity triggers (Day & Harrison, 2007; Epitropaki et al., 2017; Petriglieri, 2011; Bataille & Vough, 2022).

Scholars note frequently that people work on different identities at different times, but the temporal relationships between these processes of identity work, and the trade-offs and sacrifices ... that may accompany these choices are virtually unexplored (Brown, 2017, p. 31). “Future research on multiple identities should focus on deepening our understanding of the interaction between different work-related identities. In addition, as with many other review categories, more research adopting a dynamic perspective on multiple identities is needed” (Miscenko & Day, 2015, p. 7). Few studies have explored the relationship between work and personal identities (Kreiner et al., 2006b) and between different identities such as social identification and others, but there are even fewer which explore the dynamic interchange between identities and the impact of this over time (Miscenko & Day, 2015).

In response to this call, this study provides empirical research findings around the phenomenon of leader identity development of managers over time in relation to the appraisal of potential leader identity triggers. The study provides a deeper understanding of the dynamic interaction between multiple identities and the impact this has on leader identity development over time.

This study adds to and contributes a novel insight to management studies and leader identity scholarship through providing a framework offering insight into how leader identity develops over time, with the multiplicity of inter identity dynamics when confronted with a barrage of potential leader identity triggers.

As the researcher I selected and used LIPA as a methodological approach in order to allow for the nuances and dynamics to be explored from the lived experience of managers over a time period of eight months. The resultant findings were rich and informed a framework to provide an overview of the dynamism, fluidity of the inter identity network and the influences on responses to appraisals of triggers and the impact on leader identity development over time. Leader identity development is not inevitable over a time period, and neither is it inevitable when confronted with a series of potential leader identity triggers. The findings of this study provide insight into identity dynamics, responses and influences on leader identity development of managers over time.

The leader identity development framework builds and adds to the theoretical insights in identity literature on the identity development phenomenon in response to the appraisals of triggers (Alvesson et al., 2008; Bataille & Vough, 2022; Brown, 2015; Brown, 2017; Brown & Coupland, 2015; Hammond et al., 2017; Kreiner, Hollandse & Sheep, 2006a; Petriglieri, 2011; Sveningsson & Alvesson, 2003). The framework builds theory through offering empirical findings on the inter identity dynamics between multiple identities in a network (Alvesson & Willmott, 2002; Atewologun et al., 2017; Bataille & Vough, 2022; Brown, 2019; Lutgen-Sandvik, 2008; Ramarajan, 2014; Snow & Anderson, 1987; Watson, 2008; Wittman, 2019). The framework contributes novel insights into leader identity development over time (Beech, 2011; Brown, 2019; Campbell et al. 2019; Carroll & Levy, 2008; Day & Sin, 2011; Day & Harrison, 2007; DeRue & Ashford, 2010; Epitropaki et al., 2017; Hammond et al., 2017; Ibarra et al, 2014; Kreiner et al., 2009; Kwok et al., 2018; Lord & Hall, 2005; Miscenko & Day, 2015; Nicholson & Carroll, 2013; Watson, 2008) in response to triggers through inter identity dynamics (Bataille & Vough, 2022; Obodaru, 2012; Petriglieri, 2011).

4.31.2. Inter identity network dynamics between the self-identity and leader identity – self-identity dominant in the hierarchy

Managers do experience a network of inter identities and this is confirmed in this study that the dynamic interplay between them impact their identity development. A middle manager holds multiple identities simultaneously of a manager, leader, follower, member of an organisation as well as carrying a social identity amongst others. These sub-identities are nested in the overarching self-identity (Ashforth & Mael, 1989; Atewologun et al., 2017; Brown, 2017; Järventie-Thesleff & Tienari, 2016; Reicher et al., 2005).

A finding is that the leader identity is most impacted by the dynamics with the self-identity in the inter identity network. This insight offers a novel contribution to the identity scholarship using inter identity networks as a frame to understand dynamics between the multiplicity of identities of managers (Bataille & Vough, 2022; Ramarajan, Berger & Greenspan, 2017; Ramarajan, 2014).

The self-identity is dominant in the hierarchy of the inter identity network of managers. This confirms the literature insights (Gjerde & Alvesson, 2020) also that the leader identity is a sub-identity of the self-identity (Day et al., 2009; Hannah et al., 2009; Liu, 2022). The sample was selected purposefully as per LIPA guidelines and one of the criteria was that participants self-identify as a leader. This means that there was the presence of a leader identity. The participants hold a senior role as a general manager and so the manager identity was present. They were to be able to express themselves as to their self-awareness, which means a salient self-identity. This also confirmed that there were multiple work identities in the identity network. What was not expected was that the self-identity would predominantly influence leader identity development.

It was surprising and novel finding that the dynamics which played out were not between the leader identity and the manager identity. Participants saw their manager and leader identity as discrete identities, and there was a dynamic exchange between these particular inter identities (Carroll & Levy, 2008; Clarke et al., 2009; Thomas & Linstead, 2002). However, it emerged that the self-identity plays the most influential part in the leader identity work and leader identity development. The findings contributed to the scholarship which is cited to stating that the interplay of these inter identity dynamics and with the self-identity is less understood (Alvesson & Robertson, 2006; Alvesson & Sveningsson, 2003; Atewologun et al., 2017; Carroll & Levy, 2008; Corlett et al., 2017;

Gjerde & Alvesson, 2020; Harding et al., 2014; Kreiner et al., 2006a; Thomas & Linstead, 2002).

There are dynamics within each identity, at the intra identity level as well. The self-identity and leader identity both have layers of intra identities, like an onion. The self-identity hosts both the past self-identity narrative and the preferred identity. The leader identity hosts the alternate identity (Obadaru, 2012), the preferred and least preferred leader identity and the aspirational leader identity. There is ongoing intra identity dynamics and intra identity work particularly in the leader identity as the narrative shifts in response to leader identity triggers.

4.31.3. The appraisal of triggers – the self-identity as buffer and filter to potential leader identity triggers

The self-identity is dominant in the inter identity network and the self-identity acts as a buffer of the leader identity as it filters the potential leader identity triggers.

There are multiple potential identity triggers yet only a limited number are experienced as leader identity triggers by managers. The literature confirms that the context for business managers is demanding and one might expect for their leader identity to be called upon on a daily basis. “The macro socio-economic environment is one which brings demanding challenges to people’s identities at work” (Beech, 2017, p. 357). Geopolitical, social, environmental and technological disruption impacts the nature of work and the how businesses are organised (Petriglieri, Ashford, & Wrzesniewski, 2019; Wittman, 2019; Yukl & Mahsud, 2010).

These challenges constitute potential threats to individual identities, “[t]hreats to identity are as ubiquitous as they are unsettling” (Petriglieri, 2011, p. 641). Identity issues have come to the fore as identity work is triggered amongst organisational members alongside the organisational changes and organisational challenges (Brown, 2019; Järventie-Thesleff & Tienari, 2016).

Middle managers are in particular experiencing insecurity in their role and identities (Brown & Coupland, 2015; Linstead & Thomas, 2002). There are more frequent identity changes in the workplace (Petriglieri, Petriglieri, & Wood, 2018) Managers are confronted with an increase in triggers from the environment and organisation, which impact identity work and identity development (Alvesson & Sveningsson, 2003a; Day &

Sin, 2011; Epitropaki et al., 2017; Hammond et al., 2017; Ibarra, 2005; Miscenko et al., 2017; Petriglieri, 2011).

Given the changing context one surprising finding was that the managers did not experience many leader identity triggers during the time period. The leader identity was not triggered easily or frequently, despite the myriad of contextual and organisational changes and challenges the managers were facing. This was a surprise finding to me as the researcher and it prompted further inquiry into how managers do appraise potential leader identity triggers.

It is well understood that when an identity is triggered this prompts identity work, which in turn prompts potential identity development (Beech, 2011; Brown, 2015; Ibarra, 1999; Ibarra & Barbulescu, 2010; Ibarra et al, 2014; Komives et al., 2005; Middleton et al., 2019; Miscenko et al., 2017; Sinclair, 2011; Svenningsson & Alvesson, 2003a, Watson, 2009). It follows that if the managers do not experience potential leader identity triggers as leader identity triggers that they would be limited in their potential to develop their leader identity.

Yet the findings demonstrate that only a few potential leader identity triggers were experienced by the managers at each time point and over the time period. For each participant there were only up to two leader identity triggers experienced by them over the full eight-month period. In some cases the potential triggers were re-appraised and amalgamated and only then actually experienced as leader identity triggers.

The findings indicated that the self-identity as the dominant identity in the hierarchy which is confirmed in the literature. (Bataille & Vough, 2022). The dynamic that the self-identity acts as a buffer and a filter to potential leader identity triggers is a novel finding.

The self-identity seeks coherence (Svenningsson & Alvesson, 2003a) and the findings of this study confirm this in the extant literature. Self-identity is constructed from a relatively stable overarching set of meanings (Watson, 2008; Petriglieri, 2011), which change only gradually, but "identities can be acquired, lost, switched or modified much more quickly, and perhaps instantaneously as contexts and preferences alter" (Brown, 2015, p. 27). Identity work is undertaken in the sub-identities more readily to align with, be congruent with and supportive of the stable self-identity (Snow & Anderson, 1987; Lutgen-Sandvik, 2008).

This study did find that the self-identity is overarching, and dominant in the inter identity hierarchy, and seeks coherence and stability over time. This converges with the literature. The leader identity is a sub-identity to the self-identity and as such the leader identity will shift in relation to the self-identity.

Individuals seek a balance to preserve stability, continuity, and identity dynamism. They draw on multiple sources, desires and memories and sub-identity narratives to build an overarching self-identity narrative (Knights & Willmott, 1989; Sveningsson & Alvesson, 2003a). Identity narratives contain edited versions of the past and preferred futures (Brown, 2019).

“The field lacks a deep foundation of research that investigates the process of identity and identification over time... we urge future researchers to consider how work identity and identification form and develop; how do their meanings change, or perhaps, get lost” (Miscenko & Day, 2015, p. 23). This study explored this phenomenon and found an interesting insight around the appraisal of triggers.

The self-identity filters potential identity triggers. If the self-identity is threatened or its coherence challenged, then identity work is triggered. When confronted with potential leader identity triggers it is the self-identity which buffers these – either blocking them if they do not challenge or question the coherence of the self-identity or filtering them so that they do trigger the leader identity into identity work. The sub-identity leader identity experiences a potential leader identity trigger as a leader identity trigger when the self-identity coherence is brought to question.

When there is tension between the leader identity and the self-identity, the potential leader identity trigger is experienced as such. Since the SI seeks coherence it is when the LI is potentially triggered in a way which challenges the SI narrative, that it is then that the LI itself is triggered. This finding is a novel contribution to the leader identity literature. The LI is not triggered without a dynamic exchange with the self-identity. The dynamics in the inter identity network impact how potential identity triggers are appraised.

This is an important finding since it introduces the notion that the inter identity dynamics themselves filter the appraisal of potential identity triggers. The dynamic between the self-identity and leader identity informs the appraisal of the potential leader identity trigger. The identity implicating experience (Bataille & Vough, 2022) for the leader identity

is experienced as such when there is tension between the leader identity and the self-identity.

The implication is that the appraisal of the identity trigger is not done in isolation from the dynamics of the inter identity network and hierarchy. The appraisal is not cognitively discerned as either a threat or an opportunity. The challenge it brings to the self-identity triggers the leader identity. This finding diverges from the literature in two ways- how the boundaries or segmentation between inter identities is less discrete in the inter identity network and dynamics inform the appraisal of potential leader identity triggers and in how the experience of a trigger as a threat or opportunity is not in experience of the appraisal of the trigger, but rather in the identity response.

Firstly the findings suggest that there are less clearly defined segmentation or boundaries between the identities of the SI and LI in the inter identity network (Bataille & Vough, 2022; Hammond et al. 2017; Kreiner et al., 2017; Ramarajan, 2014). There is a tie between the SI and LI in the inter identity network and the SI past narrative infuses the LI. The drivers of the past narrative of the SI act as a driver to the LI. This is a novel finding. For Kay we see the drive to have a positive influence and to prove success is possible, to not fail. For Paul the drive from his past self-identity experience and enduring SI narrative is to reach his full potential. For Dion the narrative of his self-identity remains to be a helper and a doer. For Wendy to reach a higher status and to be pragmatic and to achieve infuse her leader identity.

These self-identity narratives are enduring and since the SI is dominant in the hierarchy it seeks coherence to remain over time. The SI holds a past enduring narrative which infuses the sub-identity of the leader identity narrative. It is when the SI narrative is brought to question through a potential trigger and the LI and SI are in tension, that the trigger is deemed to be a trigger to the leader identity. The leader identity is not triggered in isolation. The LI is triggered into identity work as it seeks alignment with the SI.

Scholars note frequently that people work on different identities at different times, but the temporal relationships between these processes of identity work, and the trade-offs and sacrifices ... that may accompany these choices are virtually unexplored. (Brown, 2017, p. 31) This study offers insights into this challenge...

In sum the findings of the study offer a novel insight to the literature that the appraisal of potential LI triggers occurs through the dynamic exchange between the SI and the LI.

The SI past narrative drives the LI narrative and beliefs about the managers as to how they are and how they should be as leaders. The impact of this is that the SI filters the LI interpretation of external events and experiences which are potentially leader identity implicating. The SI narrative filters the LI narrative and experiences. It follows that the SI then filters potential identity triggers. Given the tie between the SI and the LI as a sub-identity, the SI filters potential leader identity triggers. When the SI narrative is challenged, the potential identity trigger is experienced as a trigger and identity work is prompted. When the SI narrative is challenged through a potential leader identity trigger, the leader identity is triggered and identity work is prompted in the leader identity.

Hence we find the leader identity triggers experienced by the participants brought the self-identity narrative coherence to question. Kay experiences the most challenging year to her leadership with the economic pressures meaning she may not have a positive influence and may not succeed. Paul is invited to sit in the executive committee strategy meeting and wants to participate not as a specialist but as an executive and his full potential is being challenged. Dion has a poor performance rating and faces a team member resigning, challenging him as the doer and the helper. And Wendy does not deliver with her team but rather accepts the responsibility of a higher status project role. These potential triggers were experienced as leader identity triggers as they came into tension with the self-identity. These triggered leader identity work to seek alignment and synergy with the self-identity.

The findings suggest that the potential leader identity trigger is not appraised cognitively and consciously as a threat or an opportunity. This finding differs from the scholars who theorise that the appraisal determines the trigger to be a threat or an opportunity (Bataille & Vough, 2022; Brown and Coupland, 2015; Brown et al., 2019; Hammond et al, 2017; Kreiner et al., 2009; Petriglieri, 2011).

The inter identity dynamics and influences impact the leader identity responses. When the SI is potentially threatened or brought to question by the potential leader identity trigger, it is the resultant tension between the SI and LI that triggers identity work. The leader identity work is undertaken as the LI seeks a renewed alignment and synergy with the SI.

The participants experience identity work but may not be conscious of the dynamics between the LI and SI which lead to the identity work. It follows that the participants do not consciously appraise the potential leader identity triggers as a threat or an

opportunity. The experience of the identity work occurring within the inter identity network level at a subconscious level partially explain why intentional changes are not achieved by managers. The participants often stated they were attempting to be intentional in adopting a new leader identity such as moving away from being a specialist or moving away from being technically operational. Yet over time these very same managers find they are drawn back time and time again to the older version of their leader identity.

This was the case with Dion – even though he stated his intentions and saw the new role as an opportunity to develop his leader identity he was simply not able to and found himself in a stuck pattern. He did not consciously appraise the trigger as an opportunity but at a subconscious level the tension between the dominant self-identity and leader identity were playing out in inter identity work.

The nature of the self-identity, the influences on the identity development and the nature of the inter identity work results in responses which indicate whether the manager is experiencing the trigger as a threat or an opportunity.

The identity work leads to a response and the influences deem that trigger as a threat or an opportunity. It is not the appraisal process of the potential trigger upfront which discerns this choice cognitively and consciously ahead of the identity work. The triggers may also be re-appraised and amalgamated and result in a different experience and can be experienced as a threat or an opportunity or both or shift over time too.

The influences, the nature of the SI and the identity work which suggest the trigger is an opportunity or a threat. The findings concur with the literature that there are a wide range of possible responses to triggered identity work, ranging from diminished, stuck, expanded identities (Alvesson, 2010; Beech, 2008; Brown & Coupland, 2015; Collinson, 2003; Miscenko et al., 2017; Nicholson & Carroll, 2013; Petriglieri, 2011, Sveningsson & Alverson, 2003a; Thomas & Linstead, 2002). But it is not the appraisal which discerns an expansive or diminished identity response. The identity response and other factors work to resolve the tension between the SI and LI, and these responses may be expansionary or diminished.

These responses do not guarantee leader identity development. A diminished leader identity such as subtracting an identity such as specialist may lead to leader identity development. This occurs with Paul and he experiences the trigger of being invited to the exco as an opportunity. Whereas Dion in his new role attempts to step away from his

specialist identity and experiences this as a threat or diminishing experience. It is the influences and the inter identity dynamics and the nature of the SI that impacts the identity responses.

By way of another example, Wendy adds meaning of being a high-status leader but in this case it leads to no leader identity development. The responses are not as linear or formulaic to suggest that if deemed an opportunity will lead to a positive experience and expansive leader identity development. Nor that appraising a trigger as a threat will lead to diminished experience (Bataille & Vough, 2022). The findings suggest that the experience of the trigger is not through the appraised alone but the responses are impacted by the influences and the nature of the SI which play out in the identity work between the SI and LI. These two factors, the nature of the SI and the influences, are outlined below.

4.31.4. Leader identity work through the dynamics between the self-identity and the leader identity – the self-identity as constraint or motivator

The findings suggest that leader identity work is occurring when there is tension between the leader identity and self-identity in the inter identity network. This is a novel contribution that adds to the literature on leader identity and identity development. The LI narrative is developed either through new meaning, additions or subtractions and adjustments to find alignment and synergy with the SI (top 47). This finding concurs with the statement by Bataille and Vough (2022, p. 103) that inter identity work is applied “to address any conflicting ties that emerge in the identity network as a result of identity work”.

The findings from this study extend the literature through offering empirical findings on leader identity development and add to the theoretical framing of the phenomenon.

An additional novel contribution is that the nature of the self-identity impacts the leader identity development. The nature of the self-identity matters.

According to the findings, the self-identity narrative of the past serves as a constraint or as a motivator for leader identity development. When the past self-identity narrative was bounded it set a ceiling or constraint for the leader identity. Alternatively, when the nature of the past self-identity narrative was open in its aspirations it could serve as a motivator

or liberator for an expanded leader identity development. By way of example Paul is driven by his past self-identity narrative of wanting to live to his full potential, which serves as a motivator to develop his leader identity. In contrast, Kay is driven by her past self-identity narrative which talks to always having a positive influence and proving you can succeed and not to fail. This constrains her leader identity development potential. Bear in mind this does not prevent her developing her leader identity but rather places tighter boundaries on the leader identity development.

These findings converge with scholarship around the considerations of self-identity development over a lifetime and the influence this has on leader identity development. Liu, Venkatesh, Murphy and Riggio (2021) theorise around leader development over a lifespan. They suggest that from a life span developmental perspective, individuals are exposed to a variety of critical experiences across their life course and that specific time periods, which serve as potential windows of opportunity for one's leader development. The authors present a framework that explores the critical developmental experiences at each stage in the lifespan.

Indeed the findings of this study contribute empirical findings which suggest that the past self-identity narrative is highly influential in leader identity development. Mostly this self-identity narrative was described by the participants as having stemmed from their adolescent and school going experiences, as well as the strong influence of their parents and upbringing. Liu et al (2022, p.12) suggest the following. "Leader role models are individuals in adolescents' real or virtual environments who might guide adolescents in their leadership growth process and serve to develop their "implicit leadership theory" formation process (Komives, Longerbeam, Owen, Mainella, & Osteen, 2006).

According to social learning theory (Bandura, 1977), behaviours of role models are more effective in guiding or directing adolescents' behaviours, than simply telling teens what to do. Research by Flouri and Buchanan (2002) suggests that having a career role model positively influences adolescents' career motivation and maturity, which also aids leader development."

This study adds to the theory building as indicated in this paper as it offers empirical evidence as to how the dynamic relationship between the past self-identity narrative and leader identity impact the leader identity development. This study contributes to understanding the nuance of the influence of past self-identity in that it finds that it can be a constraint or a motivator to leader identity development.

4.31.5. Influences on the leader responses and identity development

The findings identify key influences on appraisal and responses and identity work

- Sense of agency
- Internal or external locus of control
- Learning goal orientation (LGO)
- Motivation to lead
- Having an aspirational leader identity (a sense of ambition)

These influences impact the manager responses to identity work and identity development. This finding converges with the extant literature pointing to a range of influences. Identity scholarship finds that individuals have a degree of agency in their identity construction (Bévort & Suddaby, 2016; Brown & Coupland, 2015) and many factors influence this agency. For example, an individual's learning goal orientation for example influences developmental trajectories (Day et al., 2014; Day & Sin, 2011) as does a person's level of developmental readiness and motivation to lead, social support, source and strength of the identity trigger, as well as one's thoughts, beliefs, emotions and actions (Epitropaki et al., 2017; Hammond et al., 2017; Mumford et al., 2000).

The presence of these influences does not predetermine a particular response and cannot be viewed as predictors. They do help understand the leader identity responses but they do not determine whether there will or not be leader identity development.

4.31.6. Leader identity development as narrative shift to re-align with the self-identity

Leader identity development is narrative shift. This finding converges with the identity development scholarship findings. Managers do have agency and are conscious in grappling with and potentially reformulating their leader identity narrative as identity work. For Brown et al. (2015) and Ibarra and Barbulescu (2010) (as cited by Hammond et al., 2017, p. 489) this authoring is described as the "creation, articulation, and narration of the stories that depict the situations and self in relation to individuals' understandings" and "involves not merely interpretation and meaning production but the active authoring

of the situations in which reflexive actors are embedded and are attempting to comprehend” (Brown et al., 2015, p. 267).

The contribution of this study are empirical findings that leader identity development occurs when the emerging leader identity narrative is found to be in synergy with the self-identity. When there is a renewed alignment between the leader identity and the self-identity, leader identity development has occurred.

The overarching desire is to enhance the self-identity. The central task of identity work is “crafting, experimenting with, and revising identity narratives, or stories about the self” (Ibarra et al., 2014, p. 290). This includes “activities that individuals undertake to create, maintain and display personal and social identities that sustain a coherent and desirable self-concept” (Petriglieri & Petriglieri, 2010, p. 45). Mostly the identity work is observed as a revision of a self-narrative (Ibarra & Barbulescu, 2010). Leader identity development is a dynamic and multifaceted process in which managers deal with aspects of themselves that seem incompatible with the desired leader identity but supposedly congruent with the self-identity (Petriglieri & Stein, 2012).

The narrative shift may involve a renewed meaning around leader identity. This may reflect a different intra identity of leader identity such as a preferred leader identity and or future aspirational leader identity as these came to the fore, to be salient in the identity work. A renewed leader identity was not found to be the past aspirational or alternate identity nor the least preferred leader identity. The intra identity dynamics played out within the layers of the leader identity. The identity responses as impacted by the influences, informed the leader identity narrative shift. The identity work continues over time and there are various iterations of the leader identity development over time. Identity work was resolved when alignment and synergy were found between the SI and the LI.

The findings converge with literature finding that leader identity development included a cognitive shift as the narrative is cognitively informed (Kreiner et al., 2009). The leader identity development also includes an emotive shift as the participants engage in a renewed leader identity narrative so they feel greater agency, feel more confident and open to possibilities for career progression and embodying their preferred and/ or aspirational leader identity.

The meaning does change as the narrative changes. Also salience of the leader identity is raised in the inter identity hierarchy for leader identity development to occur (Ashforth

as cited in Petriglieri, 2011). But the strength and level in the hierarchy does not necessarily change. This is where the findings differ from the literature (Hammond et al., 2017). Leader identity development may occur in a weak leader identity, as the meaning is reconfigured and aligned with the SI and is experienced as expansionary leader identity development.

The findings did not confirm the framing that there is an automatic interpretation which leads to authoring of leader identity strength and integration, nor that there is dialectical processing that leads to authoring a change in leader identity level and meaning (Hammond et al., 2017). By way of example, which is counter to this framing, Paul experiences a stronger leader identity in his renewed leader identity development and this is from experiencing a planned trigger and from dialectical processing and subtracting leader identity.

Leader identity development was found in this study to include subtracting intra identity meanings and narratives. The identity work process may include a decrease in identity in the initial phases as found by Miscenko, Guenter, Day (2017) found that leader identity changes in a curvilinear fashion (i.e., J-shaped). The initial decrease in identity that they observed indicated negative dynamics in leader identity construction, or rather, deconstruction. They find that the new identity becomes stronger, corresponding to the second part of the leader identity developmental trajectory that they identified (i.e., the upward quadratic slope).

This study found that leader identity work involves crafting a new leader identity narrative however in this study the leader identity does not necessarily get stronger and when studied in conjunction or in dynamics in an inter identity network it becomes evident that the relationship with self-identity influences its directional or content development. This has profound implications for leader development. Leader identity can be weak but as long as it aligned with the self-identity and shifted the narrative, it can develop. Conversely one can hold a strong leader identity but if this does not align in identity work in a renewed form with self-identity there is no leader identity development. Leader identity development is a narrative shift however occurs when alignment with the self-identity is found.

4.31.7. Leader identity development is not automatic enactment

Enacting refers to taking action based on the meaning derived from the authoring stage – “enacting involves acting on one’s authored leader identity” (Hammond et al. 2017, p. 490). This study found that there is not necessarily enacting of a changed leader identity. Leader identity development does not automatically lead to enactment.

Much of the literature on leader identity development draws a link between identity development and an enactment or applied behavioural changes. Identity scholarship has confirmed these links between the identity development phenomenon, leadership development and leader effectiveness (Carroll & Levy, 2008; Day & Harrison, 2007; Hogg, 2001; Ibarra et al., 2010, 2014; Lord & Hall, 2005; Miscenko & Day, 2015; Petriglieri, 2011; van Knippenberg & Hogg, 2003).

As leader self-identity evolves, one is encouraged to apply the new leadership skills obtained, which further fuels leadership skill acquisition and identity development (Lord & Hall, 2005). Liu (2022 p.12) concurs “Leader self-views define one’s self-concept regarding leadership and include leader self-awareness, leader self-efficacy, and leader self-identity (Day & Dragoni, 2015). According to Hannah et al. (2009), who refer to these leader self-views as components of a leader self-structure, they propose that this system assists in the self-regulation of leader behaviour affecting motivation, response to challenge, and performance (Lord, Hannah, & Jennings, 2011; Murphy, 2002).”

Yet this study does not find a direct link between leader identity development and enactment. Leader identity development may be a necessary but is not a sufficient condition for leader behaviour enactment. The influences and context play a role in the enactment of leader identity development and this warrants further research.

The findings converge with the literature that leader identity work may lead to the identity being stuck or in a downward spiral. Kark & Van Kijk (2007) use the terms identity promotion focus or identity prevention response. Petriglieri (2011) uses the terms identity protection response and identity-restructuring response. Whilst these may be responses that prevent leader identity development, identity development responses could also lead to ‘stuckness’ or even undoing. Individuals may experience being “betwixt and between” identities, in a period of ill-defined identity referred to as liminality (Beech, 2011). In management development, there is a process of “identity undoing”, according to Nicholson and Carroll (2013). In this study Dion showed signs of being stuck and of “identity undoing.”

4.31.8. Dynamics over time matter to leader identity development

A key finding is that leader identity development may or may not occur over time and is best gauged over a time period. The participants experienced leader identity work at different time points and were expressing different states of their leader identity narrative at these time points, which did not necessarily reflect leader identity development. For example, Wendy talks to playing a role with her team whereas this was due to time constraints as she took on a new role and not due to a shift in leader identity. In this instance if only this time point was considered one might be mistaken to think there had been leader identity development. The implication of this is that the leader identity narrative could be misconstrued as resolved whilst it is not yet resolved in terms of finding realignment with the self-identity. A risk in this is that the leader identity falls back on previous leader identities. Naturally this is a risk as the leader identity is not necessarily enacted, however there is less likelihood of this occurring if the leader identity narrative has actually shifted in meaning.

Another key finding is that potential leader identity triggers are re-appraised over time for e.g. Kay redefining how her response would be to an approach to apply for a more executive role. Also that potential leader identity triggers are amalgamated and appraised as one cluster. This occurs over time, such as Kay combining experiences to describe these as the 'perfect storm' bringing the most challenging year to her leadership. The leader identity triggers would not be understood as such if they are not viewed over a time period, as the interpretation of these may be buffered out or filtered out at earlier time points. The leader identity work and leader identity development may then be missed or misunderstood if not viewed over a time period.

The time period revealed a variety of responses and reinterpretation and clustering of triggers over time by the participants. This talks to the dynamism and fluidity of identity work in the inter identity network. Leader identity development is a complex phenomenon that is not linear and is iterative. Time reveals more opportunities to gauge the inner battles and dialogue and to see if there has been a development in leader identity. Leader identity development is not inevitable over time and the dynamics of the interplay between multiple identities continues to play out. However, in understanding one can identify a point if there has been leader identity development for not. The opportunities of this are great for understanding the phenomenon of leader identity development and for devising how best to engage and support leader development in practise. The next chapter outlines the contributions and implications of these findings.

Chapter 5 Conclusion

The study answers the research question of how managers appraise potential leader identity triggers and what the impact of this is on leader identity development over time. This chapter provides an overview of the theoretical contributions, methodological contributions of this study as well as implications for practical application. Key limitations of the current study are summarised and suggestions for future research are offered.

The study fills research gaps in several areas. This study answers the call for empirical and longitudinal research into a more nuanced view of the leader identity development phenomenon. This study is on leader identity development of managers contributing to an understudied focus in the literature. The study contributes novel findings around how the inter identity network impacts leader identity development over time. In addition, the study has a methodological contribution through the use of LIPA in the context of management studies.

The findings of this study contribute to the limited empirical work on the phenomenon of leader identity development of managers over time and hence is theory building. Further it contributes novel empirical findings of the impact of the dynamics of the inter identity network on leader identity development.

In addition, it contributes empirical findings on the appraisal by managers of potential leader identity triggers. The appraisal of potential triggers prompts dynamic identity work in the inter identity network. The ties and hierarchy of the network impacts the identity responses. The literature does find that the self-identity is dominant in the hierarchy and this study provides the finding of how leader identity is triggered, or not, in the inter identity network. The leader identity is filtered through the self-identity narrative in the appraisal of the potential leader identity triggers. The leader identity responses then play out in accordance with the tie and hierarchical position in relation to the self-identity. If the influences and the tie align there is greater potential for leader identity development. If the ties remain conflictual identity work continues over time in a bid to resolve tensions between the self-identity and the leader identity narratives. If there is no tie or a weak tie leader identity work is not triggered for managers. Even more startling is that if the self-identity is not triggered through the potential leader identity trigger, then the potential trigger is filtered out, and is not deemed a trigger.

The implications of this are immense. Whereas managers are confronted with a plethora of potential leader identity triggers on a daily basis, they according to this study experience only a few of these as leader identity triggers. Identity work on the leader identity is prompted by a few triggers and these depend on the internal inter identity network. The ties and relationship between the self-identity narrative and the leader identity narrative determine the identity responses. Over time these dynamics shift and the inter identity work is active. A longitudinal view is essential to determine how these dynamics play out and whether there is leader identity development or not.

Leader identity development does occur when the leader identity narrative shifts and aligns with the self-identity narrative and drivers. The influences of agency and learning goal orientation along with a clear aspirational leader identity reinforce the potential for enactment of the new leader identity narrative. Although a shift in leader identity narrative is a necessary it is not sufficient to ensure the enactment of leader identity development.

5.1. Contribution to the research agenda and theory building

The study makes six primary contributions to the research agenda through the theoretical transferability of the findings and hence to theory building. Firstly, a framework of leader identity development shares insights around individual interpretations of the phenomenon which contribute to the understandings within the related extant theory. The framework from this study unpacks the dynamics of the inter identity network and how this impacts leader identity development in response to appraisals of potential leader identity triggers over time.

The framework further demonstrates in this study how the dynamic interplay in the inter identity network impacts leader identity development, in particular the tie and relationship in the hierarchy between the self-identity and leader identity held by the manager. When the leader identity is aligned with the self-identity then leader identity development is enabled. When the leader identity is in tension with the self-identity identity work ensues. The frameworks helps us understand from this study that one cannot understand leader identity in isolation from the inter identity network in order to understand leader identity development. A primary contribution from this study is through offering a framework to understand the phenomenon of appraising triggers and the impact on leader identity

development over time, theoretical understanding is further deepened and the research agenda built as the framework may be studied across contexts.

Secondly, managers filter out potential leader identity triggers based on these inter identity dynamics, and this limits the potential for leader identity development.

Thirdly, the findings from this study convey that the self-identity is dominant in the hierarchy in the inter identity network and contributes to theory that the nature of the self-identity influences leader identity development. Depending on the nature of the past self-identity it acts as a constraint or motivator on leader identity development. In addition, the leader identity need not be strong for leader identity development to occur. The influences do play a role in the leader identity responses and those influences converge with the findings in the broader identity development literature namely agency, locus of control, learning goal orientation, motivation to lead, and aspirational leader identity (ambition). Interestingly the role of social support did not stand out as a primary influence.

Fourth, the framework is built through the findings from this study that identity work is experienced between the self-identity and the leader identity. If these inter identities are in tension, identity work ensues. The leader identity narrative shifts and new meanings arise, and if this results in a renewed alignment and synergy between the self-identity and leader identity, then identity work is resolved. Leader identity development has occurred in this instance.

Fifth, theory is built through the finding in this study that a shift in leader identity narrative does not automatically result to leader identity development enactment. Leader identity development enactment requires the influences of agency and locus of control, learning goal orientation and clarity of aspirational leader identity. The implications are that behavioural change is not necessarily a part of leader identity development. A cognitive and emotive shift is experienced in leader identity development, but enactment is not automatic.

Sixth, leader identity development is better gauged over a longer period and cannot be accurately interpreted at single time points. The dynamic interplay in the inter identity network shifts over time and the leader identity responses are iterative, and not linear. Leader identity responses may be expansionary and/or diminishing. Also, the manager appraises and re-appraises potential leader identity triggers and even amalgamates potential triggers, and so the development process evolves iteratively over time. Leader

identity development cannot be accurately assessed at one time point. This is also because the leader identity narrative shifts, but it is only when this re-aligns and finds synergy with the self-identity over time that leader identity develops. A shift in leader identity when this is not in alignment with the self-identity, does not constitute leader identity development.

The study offers a nuanced understanding of the phenomenon of leader identity development over time. Through gaining insight into how managers appraise potential leader identity triggers the findings indicate how this impacts leader identity over time.

5.2. Contribution to methodology

This study contributes to the growing application of interpretative phenomenological analysis (IPA) (Eatough & Smith, 2017; Pietkiewicz & Smith, 2014; Smith, 1996; Smith et al., 2022; Smith & Nizza, 2021; Smith & Osborn, 2009) and in particular longitudinal interpretative phenomenological analysis (LIPA) (Farr & Nizza, 2019; Graham-Wisener et al., 2019; McCoy, 2017) in management studies literature. The study contributes to the field and practice through applying the approach and methodology of IPA and in particular LIPA to the phenomenon of leader identity development of managers. LIPA provided a useful lens to analyse the nuances of the phenomenon and the inter identity dynamics at play in each of the participants' lived experiences. The methodology was well suited to understand how leader identity is triggered and how this impacts leader identity development over time. The approach allowed for the nuances and differences to be surfaced between participants offering a deeper and richer insight around the phenomenon.

I would encourage the application of the philosophy, principles, approach, and methodology of LIPA to study the phenomenon of leader identity development. The research on this phenomenon was well matched to the three underpinning principles of LIPA: interpretivism, phenomenology and idiographic focus.

The research paradigm of interpretivism underpins the phenomenon being socially constructed and experienced as subjective interpretation. Leader identity development is a phenomenon which is socially constructed and open to multiple interpretations by each participant. The perspective of the person experiencing the phenomenon is what counts. People develop subjective meanings of experience, and these are varied and

multiple. The researcher looks for the complexity of views rather than narrowing the meanings into a few categories or ideas. The goal of research, then, is to rely as much as possible on the participants' views of the situation (Creswell, 2012, p. 20).

The focus of LIPA is also around exploring the phenomenon. Gill (2020) states that phenomenological explorations such as these have the potential to help us “understand the complexity of human experience and gain a deeper understanding of the meaning of participants’ experiences” (Gibson & Hanes, 2003, p. 201) in order to understand the phenomena themselves. In the phenomenological analysis, human experiences are examined through the detailed descriptions (“lived experience”) of the people being studied, in an attempt to discern the psychological essence of the phenomenon (“meaning”). This analysis seeks to reveal the meaning that comprises the phenomenon within the context of the person’s lives, i.e. the “what we do or why we do what we do” (Clarke, 2009; Dixon-Woods, Shaw, Agarwal, & Smith, 2004; Larkin, Shaw, & Flowers, 2019; Smith, 2010). The interpretive phenomenology approach, which I followed in this study, has evolved followed the Heidegger (1988) tradition of phenomenology an accessing lived experience through interpretation.

Unlike other qualitative methodologies, this research paradigm requires that the role of the researcher be active to uncover the meanings of the participants experiences and perspectives. The researcher uses prior knowledge to inform the framework for the interview and analysis. These are made explicit as the researcher explains how the framework was used in the interpretation of the data and in generating the findings.

The co-constitutionality concept indicates that meanings that the researcher arrives at are a blend of the meanings articulated by both the participant and researcher within the focus of the study. This proved useful as I brought as a researcher insight into the phenomenon that assisted me to notice where I was surprised as assumptions were challenged, and to notice where deeper questioning would assist and in noting the convergences and divergences.

There is no one true meaning produced by any interpretive study, but the meanings that are stated in the research findings must be logical and plausible within the study framework, and they must reflect the realities of the study participants. As a researcher I remained true to the participants experiences and presented the verbatim quotes from the analysis of the cases in a way showing the logic and plausibility of insights. Rigour was followed in following the LIPA guidelines for credible and relevant findings.

IPA is underpinned by a hermeneutic process by engaging in a dynamic process of exploring the phenomenon as lived by individuals while also recognizing the broader significance of this phenomenon in relation to extant theory (Smith & Osborn, 2009)

In fact IPA follows a double hermeneutic enquiry. The participants are trying to make sense of their world; and the researcher is trying to make sense of the participants trying to make sense of their world (Eatough & Smith, 2017; Smith, 2004). The researcher perspectives therefore are key to interpret the data (Smith & Osborn, 2009; Willig, 2008) While IPA is committed to the value of attempting to understand the world from the perspective of an individual, it also recognizes that this cannot be done without interpretative work by the researcher. There is an iterative movement back and forth between theory and data, between pre-conceptions and openness to surprise (Tomkins & Eatough, 2014). There were a number of points this occurred through the study as I was surprised for example by the limited number of leader identity triggers, which served to deepen the inquiry in a useful way.

Another principle underpinning IPA is that of the focus being on idiographic. This means the sampling requires small samples without a point of saturation and to seek commonality in the sample, so that the phenomenon becomes the focus in the study on each participants experience in a full and deep sense over the time period. There are key analytical steps followed and the interpretations are constantly checked with the available data. IPA's idiographic focus, such that it seeks to understand individuals' contextualized experiences.

With these three principles: hermeneutic, phenomenology, idiographic, underpinning LIPA it proved to be a good match in studying the phenomenon of leader identity development in response to the appraisal of triggers over time. The primary contribution is to extend the application of LIPA to management studies and leader identity studies IPA comes into its own when examining people's perceptions of major experiences happening to them and which engage "hot cognition" (Smith, 2019, p. 167) around a discrete or ongoing event that matters in a person's life experienced as a burning, emotive and dilemmatic event (Eatough & Smith, 2017a). The event "engenders much cerebral activity, and that cognition is emotionally laden" (Smith, 2019, p. 67). Identity triggers match this experience.

Identity often emerges in the analysis of IPA (Smith, 2004, 2011; Smith & Osborn, 2009) as IPA deals with issues that matter to people and that in some way, change or influence

how people think about themselves and their place in the world. IPA is a particularly useful methodology for examining topics which are complex, ambiguous and emotionally laden (Smith & Osborn, 2015). A core concern of IPA is to consider “what is the experiential significance of what is unfolding?” and the experiential significance of an event considered in an IPA study often evolves into a concern with the significance for the person’s identity (Smith, 2019, p. 168). IPA is well suited to research on identity, and in this study, leader identity development (Gill, 2014; Gill, 2020; Smith, 1999; Smith & Osborn, 2009; Tomkins & Eathough, 2014).

This qualitative methodology is not focused on building theory with bracketing out researcher assumptions, such as grounded theory, and is not focused on the narrative in isolation, such as narrative analysis. LIPA takes the phenomenon as experienced by the person as the primary focus, and for this reason it assisted in answering the research question fully and I would recommend the wider use across disciplines.

In addition, this study contributes to the emerging application of longitudinal IPA across disciplines. Three rounds of interviews over eight months revealed the iterative nature of identity narratives and how the dynamic interplay between identities impacts leader identity development over time. The analysis required a rigorous analysis at each time point, individual and cross case analysis, as well as an analysis over the time period for each participant as well as cross case. The time period was sufficient to reveal key dynamics and the analysis provided insight into the phenomenon unfolding over time.

The dynamic interplay between the identities unfolds in a non-linear complex and iterative process. The longitudinal study revealed that an identity may develop but may not be enacted, and that triggers are filtered out and indeed revisited and identity narratives adjusted in a quest for alignment with the self-identity. Many studies consider a single event or a lens of a single identity development which does not reveal the richness of the phenomenon. IPA afforded that insight and LIPA offers insight into the dynamics overtime of multiple influences in leader identity development.

This study in sum contributed empirical research and application of IPA and LIPA to management studies with a recommendation that this be extended further into leader identity and leader development studies.

5.3. Implications for practice

The study has implications for leaders themselves and professionals and practitioners concerned with leader development.

Managers are seeking to change their ways of leading in a more dynamic world (Mumford, Zaccaro, Connelly & Marks, 2000). Entrenched intractable leader identities do not serve organisations whereas seeking more adaptive ways is better suited to a dynamic and demanding environment (Uhl-Bien & Arena, 2018). Unlocking leader identity development is needed to support adaptive leadership. Identity development is a necessary part of leader development.

This study did not intentionally tackle the issue of good or bad leader behaviours nor of an ideal leader identity. It focused on the phenomenon of leader identity development over time.

5.3.1. Managers

For managers themselves they can better understand their own personal experience of leader identity development. Through grasping the dominance of the self-identity and how the nature of this can either constrain or motivate leader identity development, managers can explore their own self-identity narrative, in particular their past self-identity narrative stemming from their childhood influences. Mostly managers can then see how they also may be missing triggers that could trigger their leader identity development and be more alert to wider range of events and experiences beyond their management role. These may be crucial to their role, their business and themselves personally. In order to do this managers would need to build their capacity to scan and interpret the context and couple this with greater self-awareness.

Managers could also better understand their leader identity narrative and the ties and relationship with their self-identity narrative. If managers want to enact on a developed leader identity, they would consider what influences this such as their agency and locus of control, learning goal orientation and how clear their aspirational leader identity narrative is. Managers could be more intentional and deliberate in crafting their leader development journey as well. As they are clearer on their leader identity development so they could bolster this with focusing on the influences to enable them to enact on enactment of the aspirational leader identity.

Many times, managers attend management development programmes and rely on the programme to build their capacity to build their leader behaviours. Managers can now take more deliberate actions to support their leader identity development and enactment. This extends beyond a learning programme and other forms of support can be brought in to support self-identity narrative awareness and development, to support building capacities of scanning a wider range of potential triggers, through building agency, as well as building intentional and focused learning goals and crafting a clear aspirational leader identity.

5.3.2. Management development programmes focused on leader development

The practitioners and professionals in this field may use these findings to design even more impactful processes and interventions to support leader development. What the study does reveal is how the nuances of the individual experience of leader identity does matter. Although further research is recommended in section 5.4 below, to be conducted across contexts the theoretical findings are transferable and may be used to consider incorporating the individualised consideration of the impact of their self-identity narrative. Each individual has a different nature of self-identity, and different experiences of the interplay between leader and self-identity, different influences of agency, different aspirations, and drivers such as agency and locus of control. So, the leader development process needs to cater for individual interpretation and application.

Raising self-awareness of the individuals is important as is raising awareness of the phenomenon of leader identity development as a part of leader development. This is where individual learning methodologies such as coaching could offer ways to support leaders in their journey and this process could be focused on the phenomenon too. Further research could identify the appropriate learning methodologies to support leader identity development drawing on the findings from this study on the phenomenon.

The practical contribution suggests there is a greater need to support leaders to expand their identity narratives of self and of their leader identity. Identity responses are limited by the triggers noticed and interpreted, as identity is socially constructed and if we do not expose ourselves to a broader range of external and internal trigger's identity work is limited.

Management development programmes can build the capacity to be aware of, articulate and explore alternate possible and preferred leader identities. Through understanding the identity development process in its complexity supports us to develop a leader's capacity which is relevant to today's organisational changing needs. Leader identity development underpins leader development.

What has emerged is the importance of the experience of leader identity development over time and those interventions that cater for this will have a greater chance of successfully supporting deliberate leader identity development. This is suited to the use of different adult learning methodologies and entrenching of leader (identity) development and enactment. Bear in mind that this does not mean the application of tasks and behaviours alone, as a precursor is the shift in leader identity narrative for the individual. Application of learning insights will not be sustainable or lead to leader development unless reinforced by a shift in leader identity narrative.

5.3.3 Organisational learning and development and talent practitioners

This study opens many possibilities for attracting, screening, and developing and promoting a more diverse cohort of potential leaders. Since we find that the self-identity is dominant and that the past self-identity is key to unlocking (or blocking) leader identity development, we see that this factor could play a central role. Further research could develop more insight and tools into discovering the nature of the self-identity narrative in the recruitment or promotion processes. The findings show that the past self-identity narrative impacted the career progression and leader development in a consistent way for the individual. In other words, it is not necessarily that the person has to have held the same or even a certain number of leader roles, but it is how they experience them through their past self-identity narrative.

A cautionary note as this finding suggests developing a new leader identity narrative does not equate to leader identity enactment. The learning and screening processes would want to look for and develop agency and learning goal orientation as well as building clarity in future aspirational identity. Another note is that leader identity development occurs within roles and does not require a shift in roles, although leader development and career progression are often viewed as synonymous by managers. Organisations need to be intentional too in what their expectations are, and requirements are of leader identity development within manager roles. Often the manager develops a

leader identity however finds challenges in the expression of this in their current role. For example, managers often see being a strategic thinker or developing strategy as a part of an aspirational leader identity, but then find few opportunities seemingly in the application of their current specialist or operational management roles.

Organizational practitioners would also be more aware now to consider the development of leader talent over time. Assessing at a single time point may not reveal the leader development nor even the leader identity development. Practitioners can consider clearer indicators of leader identity development in their talent processes.

Executives of organisations benefit by being aware of how powerful the process is of manager to screen out leader identity triggers. Businesses are confounded by economic forces, societal even climate pressures, geo-political factors, competitor pressures and digital and technology advances and threats. It is important that leaders can see and address external triggers. Executives contend with these in crafting strategies for the business. However, if managers are not alert to these external dynamics regularly, they may miss opportunities and threats that are important to the business. Managers filter out triggers that do not impact their self-identity directly and as a way to diminish the potential threats they may even diminish their leader identity, thus limiting their capacity to confront the triggers. It benefits executives and leaders to know this so they can build leader capacity to engage with external forces and build futures thinking capacities to build confidence and tools to work better in a complex and uncertain world.

5.4. Future research

The findings of the current study could be extended and advanced through future research. The phenomenon is experienced differently and interpreted differently by each individual and the impact on leader identity development was different. One of the factors contributing to the lack of leader identity development could relate to the capacity of an individual to engage in identity work. I concur with Brown in his statement and suggest further research could explore what comprises individual capacity for identity work and identity development. “Conceivably, not all leaders are equally skilled in the performance of identity work, and further research might examine those who struggle to author adaptive identity stories, and the consequences of this for organizations” (Brown et al., 2019, p. 18).

The study findings could be researched across different contexts and across different participants. IPA seeks commonality in variables amongst participants in order to better elucidate and differentiate experiences in the phenomenon. The findings could be tested across different contexts. IPA requires a small sample to better explore the nuances of the phenomenon for each participant and this too means the study could be extended across a wider group of participants to further capture rich insights into the phenomenon. The influences of factors of individuals leader identity development enactment namely agency, learning goal orientation and clarity of aspirational leader identity could be examined through a quantitative study using multi variate statistical analysis to explore the strength of relationship and degree of impact over time.

The study was intentionally agnostic to the content of the leader identity, as it was not a study focused on whether the leader is deemed good or bad. Future research could explore how and if the phenomenon of appraisal of potential leader identity triggers and the impact on leader identity development differs if the content of the leader identity is deemed as positive or negative. Similarly, to explore how the phenomenon differs if the intent is to build a more positive content of leader identity. Future studies could examine the evolution of the past self-identity, particularly from childhood and adolescence, to gauge a rich insight into how this informs leader development in adult leadership (Liu et al 2022).

Additional areas for future research include exploring leader identity enactment over time and the impact this has on the self-identity narrative, and how this plays out in the inter identity network hierarchy and ties. Future research could explore the dynamics across a wider range of intra identities for cross domain identity influence, also over time. The experience of identity work overlays the lived experience of people at work and impacts the quality of life. The experience could be anxiety provoking or liberating and energizing. Given the more recent experience of the global COVID-19 pandemic and lockdown, the way of working shifted, and many shifted to a hybrid way of working.

The personal and self-identity narratives shifted as did the narrative around work identity shift, and the inter identity dynamics have been playing out. This has been seen as people have re-prioritised what is important in their lives and many people are resisting the forced return to the places of work. We also see new work identities gaining priority in the workplace such as that of climate activists or those standing for racial, gender and social justice, diversity, equity and inclusion. These identities play out in the inter identity network and these dynamic warrants future research.

5.5. Conclusion

The current study succeeded in providing a framework of a nuanced understanding of the phenomenon on the managers appraisal of potential triggers and the impact on leader identity development over time. The contribution of this assists managers to engage constructively with a broader range of triggers to better interpret them to the benefit of the business and to themselves personally in a way that builds leader development and does not detract from it.

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Appendices

Appendix A Interview consent form

You are invited to participate in a study on leadership. If you are willing to participate, please give your consent to participate in three interviews with me on your changes as a leader.

The interviews will last for around 45 minutes. Each interview will take place a month apart, between April and August. These will be scheduled at your convenience. The researcher will record these, transcribe them and remove your name. A code will then be used for each person interviewed in order to keep the identity anonymous.

The findings will be analysed as a contribution to a PhD in leadership and will contribute to our understanding of leadership change.

Your participation is voluntary and you can withdraw at any time without penalty.

My details are provided below.

Researcher name: Sarah Babb

Phone:

Email:

Supervisor name: Prof Margie Sutherland

Email:

Co-supervisor name: Prof Louise Whittaker

Email:

Signature of participant:

Date: _____

Signature of researcher:

Date: _____

Appendix B Interview guide for researcher for Interview #1

These are notes for the researcher only and will not be shared with the participant.

OVERVIEW OF QUESTIONS AND PROMPTS

Topic & Purpose	Questions	Prompt	Timing
1. Introduction: - Follow research protocol - Set the participant and researcher at ease and establish rapport	Share the introduction and ask some demographic questions Job title Industry Age Years management experience.	<ul style="list-style-type: none"> - Welcome and thanks - Purpose of PhD study - Reminder that the study is separate from the MDP - 3 interviews until end August - Consent letter- anonymous, withdraw at any stage - Questions open – no wrong or right. Interest in your experiences and how you view yourself as a leader. Follow a guide of 6 questions and may prompt in certain areas. - Expect to last 45 minutes - Recording starts – to transcribe and allocate code to replace name/ identifiers. May take some notes for my future reference only. - Any questions? - We will confirm next steps at the end of this interview 	5 minutes (much of this serves as a reminder as this has been shared prior to the interview commencing)

2. Leadership Journey

Open questions to hear how the participant reflects their leadership identity evolution and the key shifts they identify along the way, the impact of and influences on these changes.

The first interview grounds insight into how the participant sees themselves as a leader. In the sharing insights will come up around the research focus on the experience of identity triggers, appraisal, responses and influences. Take note of these to prompt when they are raised.

2.1. Cast your mind back to when you first become aware that you were being asked to lead or found yourself leading in a situation (it could be in sports, family, faith, community, hobby, school, work). Tell me about that.

2.2. In thinking about your leadership journey since then what was a major shift or turn in this journey ?

2.3. Prompt these questions if not volunteered, around one shift or turning point that they raise in their leadership journey story:

2.3.a. What happened at this turning point or shift?

2.3.b. What led to this?

2.3.c. How did you feel?

2.3.d. What did you do?

2.3.e. What happened then?

2.3.f. How did you come to see yourself as a leader in this situation?

- Can we begin?

15 minutes

Prompt the participant to share a personal story and not to share a CV version of the story. Ask the participant to share their personal experiences of leadership and changes in leadership up until the present role.

Listen for:

- 1. Leadership Identity descriptions – how the participant describes themselves as a leader
- Prompt: How were you as a leader then?
- 2. Leadership Identity vs Leadership Style- notice if the participant talks to what they did or how they did it vs how they are self-identify in this context.
- Prompt: How would you describe yourself as a leader in this situation?
- 3. Event vs Trigger – a trigger is an experience in which the person is prompted to do identity work and consider their identity. An event may have led to a response but may not have resulted in identity work.
- Prompt: were you thinking about who you are as a leader in this situation/ experience?
- 4. Experience – Prompt: how did you feel?

- | | | | |
|--|---|--|------------|
| 3. Who are you as a leader now? | 3.1 Who are you as a leader now? | Current view and self-report on identity as a leader | 5 minutes |
| | 3.2 How do you know this? | | |
| | 3.3. Share an example of how you demonstrate this? | | |
| | 3.4. What influences your leadership? | | |
| | 3.5. What kind of a leader are you not? | | |
| 4. One experience that led to a shift in how you view yourself as a leader | Share one other time when you changed how you saw yourself as a leader, | The purpose behind this question is to provide an opportunity for the participant to share more openly. One question to be conscious of respondent bias particularly social desirability bias. | 10 minutes |
| | 4.1 Describe the situation or experience | | |
| | 4.2 How did you feel at the time? | | |
| | 4.3 What led to this experience? | | |

4.4 What happened then?

4.5 What changed in how you saw yourself as a leader?

- | | | | |
|--------------------------------------|--|--|-----------|
| 5. What is next for you as a leader? | How do you see yourself as a leader going forward? | In sharing the aspirational identity, the participants could confirm their current view of their identity and could indicate salient influences on their identity shifts | 5 minutes |
| 6. Conclusion & next steps | Thank you for participating in this interview. It has been most valuable, and I appreciate your time.
<ul style="list-style-type: none">- Confirm the interview will be transcribed and a code ascribed to ensure anonymity- Note next steps to schedule second interview- Any questions? | | 5 minutes |

SCRIPT AND QUESTIONS

1. Introduction (5 minutes)

Thank you for agreeing to participate in these interviews and for signing the consent form.

As already shared, I am a Doctoral student researching leader identity. The questions will be open ended and there are no wrong or right answers. As a researcher I am most interested in your experiences, reflections and insights. Although I have a guide of questions, I will also follow your prompts and I may ask some follow up questions. I expect that the interview will be around 45 minutes.

I will take a few notes as we go to help my recollection of our conversation and I ask that you as per the consent form let me record this interview (as below). Ask if there are any questions in relation to the consent form. The interview will be transcribed, and your name will be given a code in the transcript so as to be kept anonymous.

This is the first of three interviews, each held between April and the end of August. We will confirm the follow up dates after this interview.

Can we begin?

(Recorded at beginning also to record the brief and consent to commence)

Note to ask participants these demographic and personal details: job title, age, years of management experience, industry.

2. Leadership Journey (15 minutes)

2.1. Cast your mind back to when you first become aware that you were being asked to lead or found yourself leading in a situation (it could be in sports, family, faith, community, hobby, school, work). Tell me about that.

2.2 In thinking about your leadership journey since then what was a major shift or turn in this journey

2.3. Prompt these questions if not volunteered, around one shift or turning point that they raise in their leadership journey story:

2.3.a. What happened at this turning point or shift?

2.3.b. What led to this?

2.3.c. How did you feel?

2.3.d. What did you do?

2.3.e. What happened then?

2.3.f. How did you come to see yourself as a leader in this situation?

3. Who are you as a leader now? (5 minutes)

3.1. Who are you as a leader now?

3.2. How do you know this?

3.3. Share an example of how you demonstrate this?

3.4. What influences your leadership?

3.5. What kind of a leader are you not?

4. One experience that led to a shift in how you view yourself as a leader (10 minutes)

Share one other time when you changed how you saw yourself as a leader, in this case in a more positive light

4.1. Describe the situation or experience

4.2. How did you feel at the time?

4.3. What led to this experience?

4.4. What happened then?

4.5. What changed in how you saw yourself as a leader?

5. **What is next for you as a leader?** How do you see yourself as a leader going forward? **(5 minutes)**

6. **Conclusion and Next Steps (5 minutes)**

Thank you for your time and in sharing your responses. The next steps from my side are that I will transcribe and review the notes from the interview. I remove your name and allocate a code so that your identity remains confidential.

We will have two further interviews to be completed by the end of August. Let us discuss scheduling the second interview when we are complete here. And to remind you are able to withdraw at any time without any penalty to you.

Your contribution is so valuable and thank you for contributing to this study.

Please do ask if you have any questions.

End Interview.

Switch off recordings.

Appendix C Interview guide for researcher for Interview #2 and Interview #3

These are notes for the researcher only and will not be shared with the participant.

OVERVIEW OF QUESTIONS AND PROMPTS FOR INTERVIEW #2

Topic & Purpose	Questions	Prompt	Timing
<ul style="list-style-type: none"> - Welcome - Set the participant and researcher at ease and establish rapport 	<p>Welcome and thanks</p> <p>Overview of progress in the study and that this is interview #2</p>	<ul style="list-style-type: none"> - Welcome and thanks - Purpose of PhD study - Reminder that the study is separate from the MDP - 3 interviews until end August-Sept - Reminder of the signed Consent letter- anonymous, withdraw at any stage - Questions open – no wrong or right. Interest in your experiences and how you view yourself as a leader. Follow a guide of 6 questions and may prompt in certain areas. - Expect to last 45 minutes - Recording starts – to transcribe and allocate code to replace name/ identifiers. May take some notes for my future reference only. - Any questions? - We will confirm next steps at the end of this interview 	<p>3 minutes</p> <p>(much of this serves as a reminder from the first interview)</p>

Topic & Purpose	Questions	Prompt	Timing
<p>7. List of Triggers</p> <p>This question aims to understand WHAT the participant experiences as an identity trigger.</p>	<p>7.1. Consider the time since we last met. Share a list of the events or experiences that come to mind that led you to think about your leadership</p> <p>7.2. How do you view these events or experiences?</p>	<p>- Can we begin?</p> <p>The sms/ email reminder list can be referred to or used</p> <p>Prompts:</p> <ul style="list-style-type: none"> - Positive or negative perception of these triggers - What is the same or different between these? <p>Researcher listen for and note distinctions in:</p> <ul style="list-style-type: none"> - 1. <u>Leadership Identity descriptions</u> – how the participant describes themselves as a leader - 2. <u>Leadership Identity vs Leadership Style</u>- notice if the participant talks to what they did or how they did it vs how they are self-identify in this context. - Prompt: How would you describe yourself as a leader in this situation? - 3. <u>Event vs Trigger</u> – a trigger is an experience in which the person is prompted to do identity work and consider their identity. An event may have led to a response but may not have resulted in identity work. 	10 minutes

Topic & Purpose	Questions	Prompt	Timing
8. Experience of a trigger	2.3. Which of these events or experiences had the most impact on you? Why?	<p data-bbox="1187 247 1814 438"> <ul style="list-style-type: none"> - Prompt: were you thinking about who you are as a leader in this situation/ experience? - 4. <u>Experience</u> – Prompt: how did you feel? </p> <p data-bbox="1187 550 1814 590">Prompts (may be used if not covered) :</p> <p data-bbox="1187 590 1814 670">2.3.a. What happened in this event or experience?</p> <p data-bbox="1187 702 1814 742">2.3.b. What led to this?</p> <p data-bbox="1187 782 1814 821">2.3.c. How did you feel? Why?</p> <p data-bbox="1187 861 1814 941">2.3.d. What did you do? Why? What influenced you?</p> <p data-bbox="1187 981 1814 1021">2.3.e. What happened then?</p> <p data-bbox="1187 1061 1814 1141">2.3.f. How did you come to see yourself as a leader in this situation?</p> <p data-bbox="1187 1181 1814 1244">2.3.g. How did you see yourself as a leader after this event?</p>	10 minutes

Topic & Purpose	Questions	Prompt	Timing
9. Leader identity influences	<p>3.1 How do you view your leadership identity now? Has anything changed since we last met or not? Why?</p> <p>3.2 What has led to this (change or staying the same)?</p> <p>3.3. What influences your leadership identity staying the same or shifting? How do the influences differ across experiences? Be specific</p>	<p>Prompts:</p> <ul style="list-style-type: none"> - Leader identity may stay the same which is viewed positively - What influences identity staying the same or changing? - Note multiple influences and relationship between them - Note most impactful influence factors 	10 minutes
10. Different responses - Perceived positive and negative response	<p>4.1 Can you think of a different instant when you responded quite differently from the example you shared earlier</p> <p>4.2. Share how you experienced these situations.</p> <p>4.3 What was the same and what was different</p>	<p>Prompts:</p> <ul style="list-style-type: none"> - Different responses in one person – staying same as positive and change as negative or change as positive and staying the same as negative - Multiple responses and influences on this - Which leadership identity remains salient and prominent and why - Prompt feelings and responses and influences 	10 minutes
11. Conclusion & next steps	<p>Thank you for participating in this interview. It has been most valuable, and I appreciate your time.</p> <ul style="list-style-type: none"> - Confirm the interview will be transcribed and a code ascribed to ensure anonymity 		2 minutes

Topic & Purpose**Questions**

- Note next steps to schedule third interview
- Any questions?
- Switch off recording

Prompt**Timing**