**Gordon Institute
of Business Science**
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Factors influencing the successful transition from managing self to managing others

By

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ABSTRACT

The literature shows that one of the biggest transitions in career growth is the step-up from managing self to managing others. The difficulty of this complex transition is attributed to the complexity of managing others, of learning new skills, and understanding the need to invest one's efforts in managing others rather than their personal deliverables. The transition affects and is affected by a range of stakeholders. The experience of going through this transition is under-reported in the literature.

This research aimed to understand the challenges faced and the factors influencing a positive transition through the experiences of recently appointed first-time managers. A qualitative study comprised of 13 semi-structured in-depth interviews with first-time managers who had recently gone through this transition. The analysis identified commonalities, themes and key insights that can assist individuals and organisations in finding ways to positively influence the transition.

The results indicate the multiplicity of factors that influence this transition. The first-time manager learns best by doing but needs individual support from their line manager. The outcome from this research offers a model that illustrates how both individuals and organisations can overcome the hurdles and challenges faced when transiting from managing self to managing others.

KEYWORDS

DECLARATION

I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Business Administration at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

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Date: 1 December 2020

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CHAPTER 1: PROBLEM DEFINITION AND PURPOSE

1.1   Research Problem

Career aspirations often emerge during the early stages of one's working life which provide motivation and effort towards achieving high levels of performance. Recognition for exceptional contributions often result in a promotion that begins one's ascension in the organisation and the birth of a leadership journey. Albeit a welcome reward, the prospects of no longer being solely responsible for one's own performance, but for that of others can be a challenge. The factors that contribute towards easing this transition are not yet fully understood, which explains how newly appointed first-time managers face challenges and hurdles that are not easily overcome. Identifying the factors that influence a positive transition will result in both the individual's success within their new management role and their future leadership aspirations as well as benefiting the organisation's overall performance in achieving its strategic goals.

Leadership levels within an organisation comprise of different responsibilities and levels of accountability and usually ascend in a linear fashion. In using the framework developed by Charan, Drotter and Noel (2010), the Leadership Pipeline Model (LPM), describes the levels of organisational leadership and the transition phases from one level to another. Each level ascends in leadership and hierarchical tiers within the business context, starting with (1) managing self, (2) managing others, (3) managing managers, (4) functional manager, (5) business manager, (6) group manager, and concluding with (7) enterprise manager (Charan, Drotter, & Noel, 2010). Through this framework one can begin to understand the increasing levels of responsibility and how each level will attract new challenges faced by individuals. The model demonstrates the anticipated considerations required by individuals and organisations for each transition from one level to the next.

The challenges each transition faces illustrate the need for "managers to be proficient in applying relevant requisite knowledge, skills, competencies, and attitudes" (Freedman, 2011, p. 146). The role of overall development, individual learning ability, and individual adaptability have been emphasised as elements that contribute to the successful transition between levels of the LPM. (Freedman, 2011; Griffith, Baur, &

Buckley, 2019; Lipman, 2016). These broad concepts are identified, however, specific elements within each may require more or less emphasis dependent on the level of impact they have on one's transition from one level to the next, as well as which leadership transition is in play.

Publications and articles refer to the challenges faced by first-time managers and seek to give guidance on how to overcome these from an individual and organisational perspective (Ashkenas, 2015; Plakhotnik, 2017; Plakhotnik & Rocco, 2011; Sillett, 2015; Tjan, 2017). The difficulty of the transition from managing self to managing others is highlighted and reflects the challenges often faced by both the individual and the organisation. The factors considered to ensure a successful transition include developing new capabilities and a change in attitudes and behaviours. Promotions into first-time management roles are often awarded to technically skilled employees whose management capabilities are lacking and who have limited or no experience in managing others (Griffith et al., 2019; Warnich, Carrell, Elbert, & Hatfield, 2015).

According to the white paper "Understanding Leadership Challenges", research was conducted with first-time managers who identified 12 unique leadership challenges faced in new leadership roles (Gentry, Logan, & Tonidandel, 2014). The identified challenges provide insight into the areas of development required and the paper provides practical tips and approaches for individuals to overcome these challenges (Gentry et al., 2014).

Considering the challenges that have been identified through the above-mentioned literature, personal development in a variety of competencies is needed for first-time managers. An extensive number of publications have indicated the complexity of leadership transitions and that this is continually evolving in the changing business environments. This has indicated the need for further exploration in this field of study. Management development is widely viewed as an important area of focus for many organisations. Furthermore, the importance of developing managers to be effective in their roles is considered to link directly to the organisation's success (Warnich et al., 2015).

Due to the complexity of managing others, management development requires careful consideration and can be achieved through a multitude of methods such as formal education, on-the-job training, coaching and mentorship (Frost & Wallingford, 2013; Sillett, 2015; Warnich et al., 2015). Formal management development programmes have been used to develop leaders in terms of enhancing knowledge, skills and their abilities (Subramony, Segers, Chadwick, & Shyamsunder, 2018). Formal training alone however may be seen as lacking without on-the-job integration and could fall short of its goals. Integration of learning could involve elements such as action-learning or stretch assignments which presents real-life learning experiences in the workplace (Hezlett, 2016; Subramony et al., 2018). Stretch assignments are used to develop skills of individuals through organisations providing challenging job-assignments to individuals with purposeful intent of developing skills, knowledge and attributes (Hezlett, 2016; Subramony et al., 2018). This development method allows individuals to learn from the hands-on experiences which they would not ordinarily be exposed to in their current roles. Although organisations can be considered to demonstrate great care when promoting specialists to management roles within the organisation, the lack of experience in managing others will almost certainly require a varying degree of management development interventions.

The transition from managing self to managing others, the first transition of the LPM, is considered to have a large impact on future leadership transitions and one's performance in leadership roles (Charan et al., 2010). The impact of failing to develop, equip, support, and empower individuals at this critical step could result in long-term negative impacts in employee retention, team performance and organisational performance. Organisations cannot be limited to only identifying and developing management competencies for individuals who are transitioning to management roles, but will need to create the environment and support mechanisms internally to encourage and enhance learning and development for the complex nature of managing people. In addition, organisations face increasingly complex contexts which has led to the requirement of an individual's ability to create a competence of adaptability not only within themselves but also in those they manage (Snowden & Boone, 2007; Uhl-Bien & Arena, 2017). The degree of complexity of managing people in rapidly changing environments is potentially under-estimated and requires due emphasis from both individuals and organisations.

It is commonly viewed that the success of transitioning to management will rely on one's own drive to develop and enhance abilities, however, it is apparent that the organisation has a role to play in enabling the success of the appointment. The environment, support, and guidance provided by organisations will lead to the development of key management competencies required to successfully manage and lead others.

1.2   Purpose of Research

The purpose of the research was to gain insights and an understanding of the experiences of individuals who have transitioned from managing self to managing others to establish the factors that enable a successful transition.

Although there are extensive theories and literature that have been developed and researched over the years, there are still several challenges experienced by individuals and organisations in the transition of individuals who move from managing self to managing others. The focus of the research aims to gain richer insights into the factors that contribute to the successful transition to management by exploring individual experiences, identifying challenges faced and the supportive mechanisms that were most valued and most impactful during the time of transition. The research was designed to provide additional contributions to the current theory to provide individual and organisations with an insight on how they can effectively implement solutions that will support the successful transition from managing self to managing others.

1.3   Research Scope

The aim of the research was to explore the factors which positively impact the transition of individuals from managing self to managing others. Through the explorative study, the research first set out to explore the challenges that were faced and what interventions had helped individuals overcome these challenges. Thereafter, the exploration of identified organisational and individual factors were determined to understand the level of impact they had and how this may or may not have supported individuals in the transition to managing others.

The identified research objectives:

1. Identify the challenges faced by individuals when transitioning from managing self to managing others.

2. Identify the factors that are perceived to assist the transition from managing self to managing others.

3. The identification of which organisational inputs are perceived to be the most helpful when transitioning to a first-time management role.

4. The understanding of what line managers' actions help the transition to being a first-time manager.

5. Understand the role played by stretch in the first-time managers' development.

The semi-structured interviews conducted with 13 research participants across multiple industries provided the necessary data that was analysed to identify commonalities and any significant contributions or deterrents to the transition from managing self to managing others.

1.4   Conclusion

The research findings support the notion that both individual and organisational factors contribute to one's successful transition from managing self to managing others. The findings are able to depict specific factors from each perspective that can have a positive impact on the transition. This will assist individuals in their quest for a successful career ascension and assist the organisations in enabling the performance of managers, those that report to the managers and ultimately the performance of the organisation.

CHAPTER 2: LITERATURE REVIEW

Chapter 1 concluded in identifying the research objectives which indicate the requirement for an exploration into the challenges faced by individuals who have transitioned from managing self to managing others. Exploration of the factors that helped the transition is required to identify the elements of individual and organisational inputs that successfully influenced the transition from managing self to managing others.

Chapter 2 will review the academic theory and research literature to understand firstly, the transition from managing self to managing others and secondly, the known factors perceived to help the successful transition. The review will encompass both individual and organisational inputs. The knowledge and insights gained through this exploration of academic theory and research literature will provide details of what is already known in the complexity of the transition from managing self to managing others and will provide valuable inputs towards the research study.

2.1   Career Development

Professional development and growth is a natural aspiration to enhance the life of individuals (Griffith et al., 2019). Professionals and technical specialists often view career progression as a linear evolution towards higher levels of seniority within an organisation. Personal development aids in developing oneself with additional skills and knowledge to enable the successful progression of their career (Charan et al., 2010; Griffith et al., 2019).

In a more holistic definition, career development has been described as "a process of managing learning, experience, and change in order to achieve a personally determined, preferred professional future" (Kononiuk et al., 2020, p. 88). The individuals desire to progress in their career can enhance their propensity to and desire of professional development (Griffith et al., 2019). In understanding the development requirements in progressing from one career level to another, the level of change experienced by an individual should not be underestimated and requires a depth of understanding in order to successfully transition.

2.2 Management and Leadership Progression

Organisations commonly develop hierarchical structures that demonstrate increasing levels of responsibility and accountability. These structures provide an opportunity to employees, as they acquire experience and enhanced skills, to develop and grow throughout their careers. The levels presented in organisational structures can often seem quite unique in terms of job titles or job grading systems, however, when reviewed and analysed, these job levels can be similarly categorised using developed academic theories such as the Leadership Pipeline Model (Charan et al., 2010) and the Pathways and Crossroads to Institutional Leadership (Freedman, 1998).

The leadership pipeline model (LPM) framework reflects each level of leadership in a hierarchical depiction. The linear progression from one level to the next is considered a "passage" in which Charan et al. (2010) outlined the leadership requirements to successfully make these transitions. In some instances, organisations may adopt a less hierarchical structure which may not fully align with the leadership pipeline model. Although the framework describes a more traditional organisational structure and leadership progression, many organisations are in alignment to some degree and the leadership progression follows the model of the Leadership Pipeline.

The LPM indicates that the transitions between each level require new skills (the capabilities required to perform in the new position), a change in time application (the change in allocating time differently and to different tasks), and adjusted work values (the change in individual beliefs of what will be the most valuable focus of their efforts at any particular level) (Charan et al., 2010).
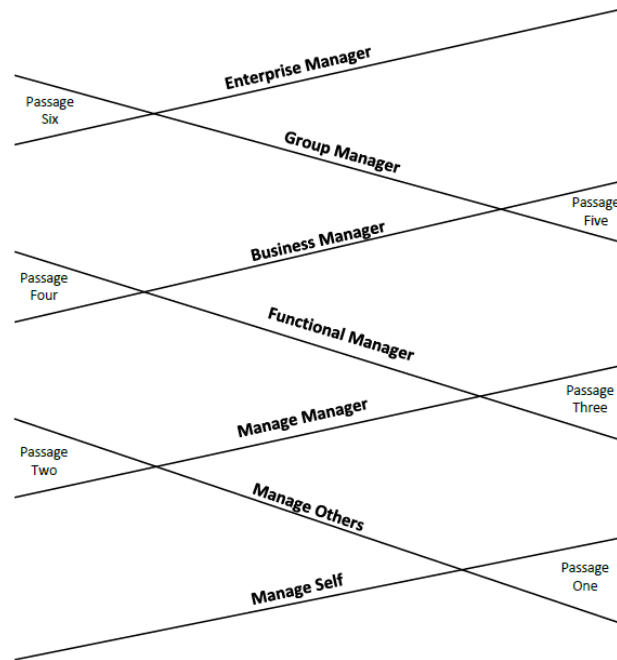
Figure 1: Drotter's Leadership Pipeline Model
(Leadership Pipeline Institute, n.d.)

A similar framework developed by Arthur M. Freedman (1998), reflects five pathways and four crossroads when transitioning upwards within an organisation. The framework begins with the first pathway of "individual contributor" and progresses upwards through a hierarchical progression concluding with the fifth pathway of "institutional leader".

Each of the crossroads depicts a change in the responsibilities and accountabilities required for each leadership level. Freedman further leveraged his transformational change model (Freedman, 1998) which applies three general principles required at each crossroad. Firstly to "let go" of elements in the previous role for which one would no longer be responsible. It is stated that this can be difficult to do as an individual will find comfort in or even be "addicted" to performing tasks or activities that they are familiar with that they can easily do and for which they have been previously praised and recognised. The second principle is to "preserve" elements of the previous role that will continue to serve in the new position. Understanding which elements to let go and which to preserve is a challenge for individuals to which Freedman indicates can often be wrongly identified. The third and last principle is to "add on" new responsibilities to which individuals are unfamiliar and have not

necessarily developed a competency to successfully deliver. Individuals may consider development unnecessary or may "doubt their capacity to learn and to adapt" (Freedman, 1998, p. 137).

Each of these principles outlined require a degree of introspection and level of know-how which may not be easily attained. It is derived that this framework and the principles required to ascend each level may require outside inputs in order to achieve successful transitions.

The transition in leadership levels results in a change of competencies that are required to be successful in the new role. Individuals are required to understand these changes and develop themselves not only on a skills level, but also by developing a change in mind-set, values, and beliefs. Considering these factors, the transformational change required is substantial which will be dependent on individual efforts and could potentially be negatively or positively affected by the extent of support, guidance, and development from peers, managers, leaders, and the organisation as a whole.

2.3   The Transition from Managing Self to Managing Others

It is apparent that the career growth of employees in organisations requires due consideration from both individuals and organisations. Individuals can begin to understand their development needs to attain promotion appointments and can identify potential challenges they may face in aspirational leadership roles. In understanding the factors that can positively impact the leadership transitions organisations can seek to implement developmental initiatives and leverage the benefits of promoting highly capable and contextually experienced employees from within the organisation.

As outlined above in the LPM framework, the critical factors needed in each "critical career passage" are centred around skill requirements, time applications, and work values (Charan et al., 2010, p. 6). Charan et al. (2010) explained that the first career transition passage from managing self to managers others is often the most difficult transition as it requires a substantial adjustment in the behavioural and work values

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adjustment. With limited or no experience or exposure to managing others the adjustment to this level will result in new and unknown experiences and challenges for individuals. Further to this, there is a risk that if the transition is not made successfully the future development and growth into higher levels of the leadership pipeline can be negatively affected (Charan et al., 2010). This highlights not only the difficulties of transitioning from managing self to managing others, but also the importance of ensuring a successful transition for the individuals benefit and that of the organisation. Figure 2 highlights the details of each critical factor for the individual contributor and the leader of others. One can see the increase and change in elements for each critical factor represented in leading others.

Figure 2: Leadership Transition from Individual Contributor to Leader of Others
(Leadership Pipeline Institute, n.d.)

Individual contributors, those who manage self, are appointed into a role that has specified skills requirements and is required to deliver specified tasks within a role in the organisation. The successful individual contributor who demonstrates high-performance levels may be identified for promotion to a first-time management role based on their technical proficiency.

Freedman (1998) described the characteristics of high-quality individual contributors which include elements such as the individual requiring limited supervision and an individual who is decisive, accountable, and hard working. In the transition to managing others, there is a shift from relying on oneself to produce outputs to managing these outputs being produced and delivered through others which leads to the requirement of an adaptive change within the individual (Freedman, 1998). Considering the change in responsibilities and level of accountability one can identify the skills and attribute gaps between the individual contributor and manager of others which will likely require intervention when the transition takes place.

Freedman (1998) developed lists of discontinuous responsibilities, requisite behaviours, and requisite competencies and attributes required in each of the models' crossroads which is indicative of how individuals can successfully "let go", "add on", and "preserve" to effectively transition. Within the first crossroad between individual contributors to manager of others, there is a requirement to shift from technical, solitary, and a self-efficacy attitude to a more collaborative, influential, team-orientated attitude. Management skills are required in delegating, directing, and supporting those who report to you as well as the need to gain an understanding of and effectively communicating the organisations intent to the team. Further to this, the manager needs to balance the requirement of continued high performance of self and that of subordinates and in addition demonstrate a commitment to personal and professional development (Freedman, 1998).

To increase the effectiveness in managing others, a first-time manager can strive for a more inclusive and transparent approach to enable performance of others. First-time managers can seek to achieve this through effectively defining and assigning work, providing regular engagement and appropriate support as well as building effective relationships with ordered reporting (Charan et al., 2010).

2.4   Stakeholders of Career Development

Career development will require inputs from both the individual themselves as well as that of the organisation. As described in the LPM framework, the leadership transition requires a values adjustment which suggests the individual's need for a change in mind-set and values (Charan et al., 2010). The requirement of skills development is required in the transition which could be seen as the organisation's responsibility. However, for the development of oneself, an individual's desire to develop, willingness to learn and commitment to apply learnings enables one's effectiveness of development and learning (Arghode, Brieger, & McLean, 2017).

The organisation has a role to play in individual career development to ensure the appropriate development is aligned to the organisational needs, to provide an environment conducive for learning in an effort to enhance their workforce abilities and performance and ultimately positively influencing their organisational success (Becker & Bish, 2017; Manuti, Pastore, Scardigno, Giancaspro, & Morciano, 2015; Turgut & Neuhaus, 2020).

2.5   Personal Inputs to the Transition from Managing Self to Managing Others

2.5.1 Adult Learning

A study conducted by Arghode and Brieger (2017) examined adult learning theories which discusses the various theories and models of adult learning. The learning model, Andragogy states that adult learning is self-directed and that adults learn through experience and application (Arghode et al., 2017). Literature indicates that (1) adult learners are motivated to learn based on their immediate needs, (2) adult learning is life-long, (3) learning through experience is a main resource for adult learning, (4) adults need to be self-directed in their learning and (5) individual differences among people increase with age (Trotter, 2006). A study exploring management development experiences reiterates the adult learning principles and states that adult learners prefer self-directed learning, learn through experiences, have a need to see the value in learning, and need to possess a readiness to learn (Becker & Bish, 2017).

In considering the adult learning principles discussed above, the consideration for learning through experiences and the application of learning is a prominent factor to enable learning. To this end, the Experiential Learning Theory (Kolb & Kolb, 2017) provides a relevant approach to adult development.

2.5.2 Experiential Learning Theory

Experiential learning theory is described as "a dynamic, holistic theory of the process of learning from experience and a multi-dimensional model of adult development" (Kolb & Kolb, 2017, p. 11). The experiential learning theory provides a framework exploring three elements (1) the learning cycle, (2) learning style, and (3) learning space.

The learning cycle contains four stages which include the dual dialectics of action/reflection and experience/abstraction (Kolb & Kolb, 2017). The cycle reflects four stages of learning needed to grasp and transform experiences. The theory suggests that optimal learning takes place through the integration of all four stages.
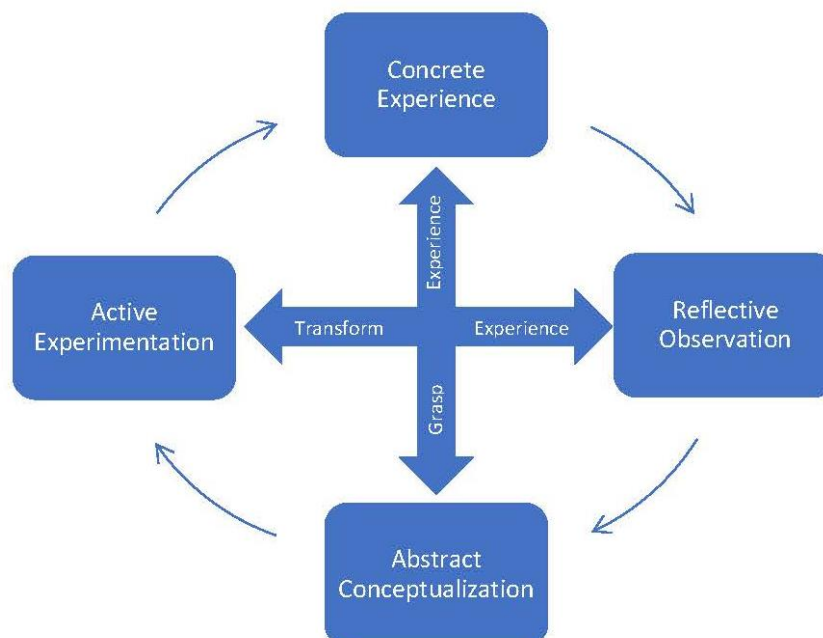
Figure 3: The Experiential Learning Cycle
Source: Adapted from (Kolb & Kolb, 2017)

The learning cycle begins with the learning stage, concrete experience, and progresses to reflective observation, abstract conceptualisation, and lastly active experimentation. Table 1 provides further description for each stage of the learning cycle.

Table 1: Kolb's Learning Cycle Stages

Learning Stage	Description
Concrete experience	Doing or having an experience
Reflective observation	Reviewing and reflecting on the experience
Abstract conceptualisation	Concluding and learning from the experience
Active experimentation	Planning and trying out what you have learnt

Source: Kolb and Kolb (2017)

In a recent publication, a revised Experiential Learning Cycle model was developed which proposes to address higher-order learning. The research and model refer to experiences in two categories, planned and unplanned. The model further includes the concepts of "management of emotions" and "unlearning". Even though further research should be conducted to examine the revised model, it is suggested that by including these elements deeper learning can take place (Matsuo & Nagata, 2020).

Learning styles determined through the Kolb Learning Style Inventory (KLSI) assessment tool reflect an individual's preferred learning style. The four basic styles, experiencing, reflecting, thinking, and acting is further expanded into nine more distinctive learning styles. The Experiential Learning Theory suggests that an individual's learning style is not necessarily static and is influenced by the contextual environment of learning.

Furthermore, it suggests that a learning style preference can indicate an individual's propensity towards a learning mode and can assist in identifying development in areas for individuals to enable learning through all four stages of the learning cycle. As depicted in Figure 4 below, the nine learning styles and the alignment to the learning cycle are reflected (Kolb & Kolb, 2005, 2017; Matsuo & Nagata, 2020).
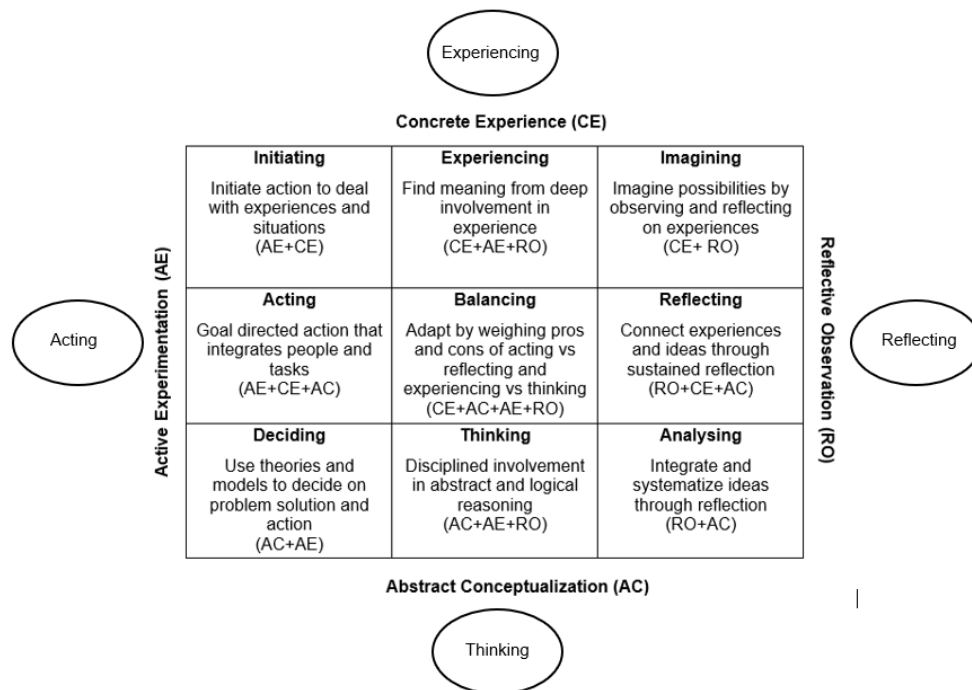
Figure 4: The Nine Learning Styles in the KSLI 4.0

Source: Adapted from Kolb and Kolb (2017)

The transition from managing self to managing others has indicated the need for development and the understanding of how one learns can assist individuals in achieving the required development. Adult learning principles indicate the need for learning through experiences. Kolb's Experiential Learning Theory demonstrates how effective learning can take place once an individual understands the elements of the learning cycle as well as their learning style. Using these insights, individuals are able to embark on initiatives of self-development as an input to the successful transition from managing self to managing others.

2.5.3 Sense of Agency

A sense of agency in the context of learning and development is described as the learner themselves being "key agents for of their learning" (P. Williams, 2017). A sense of agency in learning is further explained as having an understanding that expertise is built over time and that this expertise can be achieved through learning from failure and from drawing knowledge and expertise from others (P. Williams, 2017). A research study focused on teacher career development states that a sense

of agency is said to be a "critical factor in the process of professional growth" (Strahan, 2016, p. 668). The research further elaborates that a sense of agency encompasses the belief that individuals have the ability to influence their lives and environments and the belief in one's ability to succeed (Strahan, 2016). Furthermore, the authors mention a further characteristic that enables professional development which is the ability to collaborate and engage with others (Strahan, 2016).

In gaining insights to the concept of individual agency, it could be seen as an input towards the levels of one's self-belief and self-efficacy. This in turn could impact the level of one's ownership and drive towards learning and development which can impact the successfulness of the management transition.

2.5.4 Resistance to Change

Career management transitions can be dependent on an individual taking agency in their own development and growth (Turgut & Neuhaus, 2020). Individuals who are change resistant are found to engage less in career development initiatives which could be detrimental to their management development (Turgut & Neuhaus, 2020). Individuals can seek to overcome their resistance to change though training and coaching engagements which will lead to increased engagement of learning and management development (Turgut & Neuhaus, 2020).

Dealing with change is complex and difficult to navigate. It is important to understand how the element of change will affect one's ability to learn when faced with a management transition. Through identifying one's resistance to change they can begin to discover the inputs required to overcome this and remove blockages to development.

2.5.5 Barriers to Learning

A literature review conducted by Osam, Bergman and Cumberland (2017) provides an overview of barriers impacting adult learners returning to college. Although this review is specifically referring to adults returning to a formal institution of study, the

barriers remain valid in considering various learning means. The study highlights three barriers.

The first is referred to as the situational barrier. The situational barrier speaks of adult learners' family-life or financial means as a barrier. The adult learners available time may be less due to family commitments and that considering the increased financial responsibilities faced by older adults they may have decreased affordability for training and development (Osam et al., 2017).

The second barrier identified is an institutional barrier. The barrier mentions that a lack of flexibility, the timing of courses or programmes, and a lack of online options is a barrier for adult learners who require increased flexibility due to work and/or family demands. In addition, there is mention of a lack of appropriate support for adult learners at institutions in terms of the stress faced by adult learners specifically (Osam et al., 2017).

The third and last barrier is that of disposition. This barrier refers to adult learners having a fear of failure and low perceptions of their ability to achieve. The reports states that adults require high levels of determination and self-resilience in order to overcome this barriers (Osam et al., 2017).

2.6 Organisational Inputs to the Transition from Managing Self to Managing Others

Understanding the importance of organisational factors that influence the transition from managing self to managing others can assist the organisation to facilitate the successful transition of individuals which will ultimately benefit the organisational performance (Charan et al., 2010).

Many organisational elements could potentially have an influence on the success of a management transition (D'Netto, Bakas, & Bordia, 2008; Plakhotnik, 2017; Sillett, 2015). To understand the organisation's role in relation to management transitions, key variables associated with management effectiveness development, based on a developed model, have been identified (D'Netto et al., 2008). The model focuses on elements that are within the organisation's control and provides valuable information

in understanding the dependent variables of management development. With the intention to gain insights into the factors driven by the organisation that have had an influence on the newly transitioned managers the following key areas have been selected as areas of focus for the research.

2.6.1 Training and Development of Managers

A widely held view is that training and development initiatives are important for employees of all levels in an organisation to ensure the organisation's effectiveness in a rapidly changing and competitive environment. Training and development interventions are used to enhance employees' skills, knowledge, and behaviours as well as to enable managers to successfully execute the organisation's strategy (Warnich et al., 2015; Yeardley, 2017). Development management skills and capabilities are critical to ensure the effectiveness of employees and essential for business viability in rapidly changing environments (Becker & Bish, 2017).

A research study developed by Aragon and Valle (2013) conducted in 2013, sought to analyse the effectiveness of training and development in managers. It indicates a significant positive correlation between (1) the investment in resources allocated to training and development and (2) the emphasises on the importance of the amount of time afforded to managers for training and development, to the management effectiveness in terms of abilities, involvement, and innovativeness (Aragon & Valle, 2013). The importance of management development is further emphasised in that "effective management can lead to the achievement of the organisation's strategic goals and objectives" (Warnich et al., 2015, p. 370). Aragon and Valle (2013) also outline and illustrate that managers require development in three areas being, (1) technical skills, (2) conceptual skills, and (3) human-relations skills. The first-line manager requires more technical skill development in relation to conceptual and human-relations skills and as one progresses up the leadership pipeline to middle management level and top management level, the inverse will apply (Warnich et al., 2015).

Training and development required for management development can include many different approaches, objectives, and methods which necessitates appropriate

consideration for organisational and individual needs. Selected examples of learning methodologies, namely informal learning and formal learning are discussed below.

2.6.2 Informal and Formal Learning

Within formal and informal learning contexts, there is a multitude of different training and development options with varying delivery methods which can be used to develop individuals and managers (Frost & Wallingford, 2013). Informal and formal learning methods can include both on-the-job (OTJ) training and away-from-the-job training (Warnich et al., 2015). Formal learning can be described as structured learning which typically takes place outside of the working environment and is a planned intervention designed to achieve specific outcomes (Becker & Bish, 2017; Manuti et al., 2015). Informal learning is largely considered to refer to learning that takes place within the work setting and is unplanned in nature. This learning is believed to take place through situational experiences that result in performance development. Although informal learning is not structured or delivered through a learning facilitator, it can still rely on learning through others such as peers and superiors (Becker & Bish, 2017; Manuti et al., 2015).

As formal learning is structured it is often facilitated in a classroom-based setting (Manuti et al., 2015; Park & Choi, 2016). The interventions are designed to develop individuals in order to increase performance levels within their roles. Development of knowledge, skills and awareness can be addressed through different types of interventions within formal learning which could include facilitated interventions such as workshops, conferences, training sessions or academic lectures.

The unstructured nature of informal learning takes place through the engagement with others and that of one's own efforts as and when the learning needs arise. Examples of this could take the form of receiving guidance from others or one's learning through action or observation (Park & Choi, 2016). It is estimated that "90 percent of training and development derives from on-the-job training" (Warnich et al., 2015, p. 353). Informal learning has the potential to play a large role in management development and could include methods such as informal mentoring, informal coaching, job-shadowing as well as problem-solving through involvement in

challenging projects (D'Netto et al., 2008; Manuti et al., 2015; Turesky & Gallagher, 2011). Informal approaches to learning are increasingly favoured in the view that it is more effective in adult development as it tends to be based on experiential learning through application (Becker & Bish, 2017).

A study conducted in 2017 (Becker & Bish, 2017) explored the experiences of informal and formal management development and reflects that learning took place through a number of activities (Becker & Bish, 2017). The most common management development experience was "learning from work" which is explained as learning through daily work and trial and error. The second most common management development experience was "learning from others" which is described as observing others and gaining knowledge from mentors. The third most common management development experience was "learning with others" which speaks of learning from others who are in similar roles through collaboration and knowledge sharing practices. Lastly, "formal learning" was identified as a common management development experience which included learning from formal facilitated interventions (Becker & Bish, 2017).

The research went on to explore future management development expectations and preferences which showed there was higher levels of desire for formal learning and learning from others. The desire for formal learning included an element that the formal learning interventions be targeted to specific skills development needs. The desire to learn from others required the adaptation to enhance this learning by formalising the mentorship and coaching relationships. In addition, albeit with lessor preference, learning from work and learning from others were also identified as preferences for future management development. There was value seen in learning from work, however there was a desire for this way of learning to be more structured in providing opportunities to work on new work activities or roles to learn beyond one's current role. In terms of learning from others, the ability to share with others was valued, however the limitations of an unsafe work environment was identified as a factor that could limit the ability of admitting errors or sharing negative experiences (Becker & Bish, 2017).

In utilising informal or formal training and development for management development there are considerations for organisations in choosing the right type of learning and

providing opportunities to further embed the learning through internal practices. It is shown that there is benefit in identifying learning opportunities, encouraging and providing structure to informal learning experience and creating a culture that translates learnt skills into practice.

2.6.3 The Role of Stretch in Management Development

Leadership development practices are described to involve two processes, differentiation leadership development practices and integration leadership development practices. Differentiation is explained as building the skills, knowledge and abilities of leaders through more formal training processes whereas integration involves integrating the learning in the workplace through practices such as action-learning, stretch assignments or job rotation (Subramony et al., 2018).

The integration element of leadership development is said to enable transferability of learnt skills to the workplace (Packard & Jones, 2015). Stretch assignments are considered as job-challenge developmental activities that are allocated to individuals for the specific requirement of their leadership development. They can be used as part of a formalised training intervention, however are also considered as a stand-alone method of experience-driven learning in that one is learning through doing (Hezlett, 2016; Subramony et al., 2018).

Stated in a Harvard Business Review article, *Turning Potential into Success: The Missing Link in Leadership Development*, stretch assignments help to build individual leadership competencies and executives considered stretch assignments and job rotations as the most important way to accelerate one's career (Fernández-Aráoz, Roscoe, & Aramaki, 2017). The emphasis placed on the value of using stretch in management development points towards this being an input in the development of those transitioning from managing self to managing others. Exploration in understanding how stretch influences this transition will provide additional insights to this development practice.

2.6.4 Learning Space, Culture and Environment

To enhance and embed learning the Experiential Learning Theory describes the need for an optimal learning space to engage learners in all four stages of the learning cycle (Kolb & Kolb, 2017). The learning space needs to be a safe environment where individuals feel supported in their learning journey. Learning can be optimised through having a learning space that enables engagement between peers and provides an environment where it is safe to make mistakes. Whilst still ensuring a challenging learning experience, individuals will require time to practice and develop skills or expertise in order to embed the learning (Kolb & Kolb, 2005, 2017).

Alignment of formal training and development initiatives to the work environment provides an opportunity for skill utilisation which ensures that not only are investments made in appropriate development but also that the necessary skills transfer to the workplace (D'Netto et al., 2008).

Organisational culture, understood as the attitudes, behaviours, and practices within an organisation (Schein, 1985), can play a role in the effectiveness of management development (D'Netto et al., 2008). A learning culture supports employees in their development by placing a high value on the concept of development, creating an environment that supports cross-functional engagement, as well as ensuring that support of the development is received from line managers and top management (D'Netto et al., 2008).

Informal learning includes the concept of learning through work, or learning through doing, which is explained as on-the-job learning through trial and error (Becker & Bish, 2017). An environment and culture where employees feel comfortable and safe is required for this type of learning and relies heavily on the supportive culture developed by the organisation.

To support this concept, a study conducted in 2017 (Weinzimmer & Esken, 2017) empirically demonstrates that an environment that tolerates mistakes enables organisational learning. It is explained that human nature tends to refrain from seeing the value in making mistakes and rather sees this as weakness or failure (Rolková &

Janošková, 2014) which indicates that in order for employees to feel safe to make mistakes and to be able to learn from these mistakes is not necessarily easily achievable by organisations. Beyond mistake tolerance, organisations can gain benefits from truly understanding and imparting the ethos that there is learning value that can be gained through making mistakes (Weinzimmer & Esken, 2017).

2.6.5 Line Management Support

Line management support can be achieved through providing support, encouragement, and allocation of time for individuals to take part in training and development initiatives as well as the opportunity for newly acquired skills to be utilised in the workplace (D'Netto et al., 2008). Furthermore, coaching and mentorship received from line managers play a critical role in the development of managers (D'Netto et al., 2008; Turesky & Gallagher, 2011).

It is suggested that managers are increasingly needing to utilise coaching skills to develop employees through coaching engagements (Milner, McCarthy, & Milner, 2018). Mentorship and coaching activities can give support to first-time managers through the sharing of their knowledge and their own experiences which provides valuable guidance and insights for learning (Becker & Bish, 2017).

2.7   Conclusion

The literature outlined in this chapter has provided details of the LPM framework which describes the leadership transitions experienced in a linear career progression (Charan et al., 2010). A deeper review of the transition from managing self to managing others has been presented which outlines the need for the change of skills, value adjustment and time allocation.

The management transition and concept of career development requires both individual and organisational inputs in order to achieve a successful transition from managing self to managing others. The elements outlined in the literature review provide insight into various factors that can contribute to a successful transition.

The purpose of the review of academic theory and research literature conducted and outlined in this chapter is to understand the factors that are seen to influence the successful transition to management. The literature review has provided an understanding of the factors that influence the transition of individuals to first-time management roles.

Individual factors identified include the need for individual learning, a sense of agency and an adaptability to change. Types of learning were explored which illustrates the need to gain further understanding of which of these are most effective in positively influencing the transition from managing self to managing others. Barriers to learning were also investigated which indicates the exploration of factors that may hinder learning and adversely affect the management transition.

Individual agency was explored and provides an indication that this may have an influence on the management transition. Limited research has been conducted in the connection of individual agency to the successful transition to management.

The literature review explains the substantial change individuals will experience when transitioning from managing self to managing others. The research shows that resistance to change can adversely affect one's ability to drive their career development. It is an important element to consider as a barrier to the management transition. There appears to be limited research on the relationship between adaptability of change and the transition from managing self to managing others which indicates the need for further exploration.

Organisational factors identified in the literature review gave insights into the role of organisations providing training and development opportunities to newly transitioned managers, the impact of the organisational culture and environment to the transition as well as insights into the role of one's line managers to the transition from managing self to managing others.

The literature explored two types of learning, informal and formal, that an organisation can consider for training and development initiatives to positively influence the individual's transition from managing self to managing others. There are indications that both formal and informal learning will be beneficial for newly

transitioned managers. There will be benefits to gaining a deeper understanding of which types of learning and training interventions have had the most impact and will provide an indication of where organisations should focus their training and development efforts.

The literature review also provided insights of the impact an organisational culture and environment can have on the transition from managing self to managing others. It is suggested that a culture that promotes learning and an environment that is safe for individual to make mistakes will positively influence individual learning. The impact of this to the transition from managing self to managing others is not deeply researched and will benefit from further exploration.

Lastly, the role of line management has been identified as an influencing factor to the management transition. Further explorations of what actions a line manager can take that will specifically help the transition from managing self to managing others will add to the current literature and again provide valuable insights for organisations and their role in aiding a successful transition.

Therefore, the research aims to contribute to the academic theory and literature already developed in this field of study. Exploration of the challenges faced and inputs that have helped the transition will be included in the research. In addition, exploration of the most helpful organisational inputs, what and which line management actions were most helpful, and how the role played by stretch in first-time management development has impacted the transition from managing self to managing others will be incorporated. The research hopes to provide organisations and individuals with deeper insights to enhance the impact towards the successfulness in the transition from managing self to managing others.

CHAPTER 3: RESEARCH QUESTIONS

The overriding research question was to understand the factors that influence the successful transition from managing self to managing others. The research aimed to understand the challenges faced and the attributors that had a positive or negative impact on individuals at the time of their transition. Based on the literature above the following research questions were developed.

3.1 Research Questions

Research Question 1:

Identification of challenges faced by individuals when transitioning from managing self to managing others.

Research Question 2:

Identification of factors that are perceived to assist the transition from managing self to managing others.

Research Question 3:

Identification of which organisational inputs are perceived to be the most helpful when transitioning to a first-time management role

Research Question 4:

Understand what line managers' actions help the transition to being a first-time manager.

Research Question 5:

Understand the role played by stretch in the first-time managers' development

CHAPTER 4: RESEARCH METHODOLOGY

4.1 Introduction

This chapter outlines the research methodology that was used for this study. The population, sample size, sampling method and research instrument are described. Furthermore, the process of data gathering and analysis are explained, and ethical considerations and research limitations are outlined.

4.2 Research Method

The purpose of the study was to understand the experiences of those that have transitioned from managing self to managing others. To gain the insights of these unique and personal experiences an exploratory approach was selected which follows the philosophy of interpretivism, which in turn allows for the interpretation of the subjects' perceptions of the varying factors that influenced the transition from managing self to managing others (Schweber, 2015). Considering the aim of the study, a qualitative, inductive exploratory method was used to contribute to theory development (Schweber, 2015). This research philosophy provided an opportunity to gain the appropriate depth of data required from participants of their unique experiences from their own perspectives. As such, the interview process asked participants to recall their personal experiences and what factors influenced their transition to a management role. The research approach therefore provided the opportunity to understand the factors that may or may not have had a positive impact on the management transition as well as identify unknown elements in the subject area.

Considering the inductive and exploratory nature of the research, it sought to build on current theory and provide new insights in the identified field of study (Woo, O'Boyle, & Spector, 2017). The process explored a detailed account of specific individual experiences of first-time managers, which was then analysed to gain further knowledge in a relatively under-researched and complex subject area. Determined by the exploratory nature of the research, a mono-method methodological choice applying qualitative methods to gather data was selected.

The research aimed to build on past research conducted and gained insights into the factors that impacted the transition from managing self to managing others.

An individual narrative inquiry strategy was used to interpret personal accounts of life experiences of individuals who have transitioned from managing self to managing others (Creswell, Hanson, Clark Plano, & Morales, 2007). A cross-sectional time horizon was used in the research as the data was collected through interviews from multiple participants at a specific point in time (Williams, 2007).

Semi-structured interviews were conducted with individual participants to encourage them to share their experiences from their own perspectives. Based on literature within the field of study, themes and topics were identified and explored in each interview to gain insights on each of the research questions. The themes and topics were centred around the factors that may have an impact on the transition to managing others which included the organisations learning culture, training and development, line manager support, skill utilisation and the psychological safety felt by the individual within the organisation. The interviews provided an opportunity for participants to share their experiences openly and with an ability to introduce additional themes without the constraints of identified themes. In using a semi-structured format, additional questions were posed during interviews which were dependent on the participant's responses. Furthermore, considering the complexity of the individual experiences of the participants, the interview design evolved during the data collection process which explored information that arose during the interviews.

4.3   Population

The population consisted of first-time managers who had recently (within the last 20 months), transitioned from managing self to managing others. The restriction of tenure of the participant's first-time management roles allowed for the accurate recollection of their transition experiences. For purposes of this research, a manager is defined as an employee who managers other/s directly. The aim was to access new managers in a range of industries.

4.4   Sampling Method and Size

Purposive, homogenous sampling was used in selecting appropriate participants who aligned with the pre-determined criteria relevant to the research objective (Guest, Bunce, & Johnson, 2006). The participants had similar characteristics in that they have transitioned from managing self to managing others recently. Two conditional requirements for participants were that they would have been employed in their management role for no longer than 20 months and that their current role is the first management role of their career. A homogenous, non-probability sample size of 12 participants is considered suitable for the inductive exploratory research which has the aim to understand common perceptions and experiences (Guest et al., 2006). Utilising judgemental plus convenience sampling enabled the access to participants (Vehovar, Toepoel, & Steinmetz, 2016), a sample size of 13 participants was selected from a homogenous group, that of first-time managers, employed across seven industries. After 13 interviews data saturation was reached in that no new themes emerged in the last two interviews (Guest et al., 2006).

4.5   Unit of Analysis

The unit of analysis was experiences and insights of the transition to a first-time manager role, shared by the individuals sampled as participants.

4.6   Measurement Instrument

To enable the gathering of appropriate data from participants, semi-structured face-to-face interviews were conducted. The semi-structured nature of the interviews sought to "encourage participants to tell stories from their own perspectives" (Saunders & Lewis, 2018, p. 158). Thorough preparation was required for the interviews which included the development of a prepared interview schedule or guide to direct the engagement with the research participants (Rowley, 2012).

The use of an interview guide with pre-defined themes and topics which were developed in line with relevant theory and literature was used in order to provide structure, interviewer guidelines and instructions in order to navigate the

conversations during each interview to obtain reliable qualitative data (Cohen & Crabtree, 2006). The semi-structured nature of the interviews allowed flexibility in that questions did not need to be asked in a specific order and could be adapted based on the participant's responses. This approach ensured that relevant information was shared providing the required depth and authentic responses and contributions required for the study.

The development of the interview guide was influenced through the literature review outlined in chapter two with the aim to attain meaningful data. Most of the questions were open-ended to allow the participant to share extensive information and provide rich insights needed for the explorative study. The questions developed avoided being closed, misleading, leading, or ambiguous in nature (Rowley, 2012). Prompting questions were developed for each broad interview question which could be used if required to ensure the interview did not waver too far from the topic and to avoid potential lack of depth of the participant responses.

A pilot interview was conducted with the intention of ensuring that the interview questions were easily understood, that the interview flowed optimally, and that the information gathered was viable in providing sufficient insights for analysis (Jacob & Furgerson, 2012). The pilot interview resulted in a revision of question ordering as well as eradicating duplication. Questions were also rephrased by removing jargon and simplifying terms to those that are more commonly used in the workplace.

Table 2 demonstrates the interview questions alignment to the research questions outlined in chapter 3. The final interview guide is presented in appendix 1.

Table 2: Mapping of Research Questions to Interview Questions

Research Question	Interview Question
Research Question 1: Identification of the challenges faced by individuals when transitioning from managing self to managing others.	**Question 4** Thinking back to when you first became a manager, can you describe some of the biggest challenges your faced?
Research Question 2: Identification of the factors that are perceived to assist the transition from managing self to managing others.	**Question 5** What do you think helped you the most in this transition?
	Question 17:

	Can you rate each of these items from 1 to 5 indicating the amount of positive impact each had in assisting you in your transition to being a new manager, 1 being no impact, 3 being of moderate impact and 5 being substantial impact. (1) Formal training the development (2) Informal training and development (3) My line manager's support (4) Opportunity to put new skills into practice (5) Guidance and learning from others outside of the organisation (6) My own efforts
Research Question 3: Identification of which organisational inputs are perceived to be the most helpful when transitioning to a first-time management role.	**Question 6** Did you receive any formal on-the-job training and development to you becoming a manager?
	Question 7 Did you receive any informal on-the-job training and development to you becoming a manager?
	Question 8 From the interventions you have mentioned, which ones do you feel helped you the most in your transition to the management role?
Research Question 4: Understand which line managers actions help the transition to being a first-time manager.	**Question 11** Thinking back to the first few months of you being in this new management role, what do you feel your manager did well in supporting you?
	Question 12 Do you feel your manager could have done anything more to support or help you during this time?
	Question 13 Is there anything else you would like to comment on with regards to your line manager in relation to your transition to a management role?
Research Question 5: Understand the level of impact an organisation's environment has on the transition to a management role.	**Question 9:** Being a new manager, receiving informal and/or formal training, did you feel you were able to effectively apply these newly learnt skills in your role?
	Question 10: Do you feel learning by doing has value and has this been beneficial to you in the transition to management?
	Question 14: When you were appointed into this management role, did you feel that the organisation valued learning?
	Question 15: Did you feel that the organisation valued management development specifically?
	Question 16: We all tend to make mistakes when we get promoted, thinking to when you first moved into your management role, what happened when you made a mistake?

4.7   Ethical Clearance

Prior to conducting the research interviews and collecting data, ethical clearance was obtained from the University of Pretoria's Gordon Institute of Business Science. The research methodology, interview questionnaire (appendix 1), informed consent letter (appendix 2) and non-disclosure agreement (appendix 3) were submitted along with the confirmation to preserve participant's confidentiality to the university's ethics committee. An ethical clearance certificate (appendix 4) was received and thereafter data collection commenced.

4.8   Data Collection

In line with exploratory research, primary data was gathered from research participants through semi-structured in-depth interviews. In order to conduct effective interviews the locations of the interviews were convenient for the participants and where they felt most comfortable (Rowley, 2012). The benefits of having a comfortable environment is that it allowed participants to feel relaxed and assisted in providing an opportunity to share their experiences freely. The initial approach to conducting interviews face-to-face was unfortunately constrained due to the Coronavirus pandemic experience at the time of the study. The South African government-imposed lockdown restrictions which resulted in limitation of physical contact with others. The constraint meant that interviews were conducted over virtual platforms, namely Zoom and Microsoft Teams. Interview participants were provided the option to select any virtual platform to further aid their comfort-level and familiarity with the technology in order to reduce any unnecessary stress or anxiety that may have resulted in using these means in conducting the interviews. To provide the opportunity to demonstrate an interest in the participant's experiences and convey empathy in response to any emotional incidents video cameras were used during the interviews. The result of this was demonstrated through the level of engagement the participants had in the topic of research and the enthusiastic sharing of information.

The interview guide (appendix 1) was developed and tested through the pilot process mentioned in section 4.5 to ensure the interview flow was optimal. The research topic and aim was introduced to participants at the start of the interview, with the intention to illicit interest in the interview and promote engagement in the topic of discussion

(Rowley, 2012). In an effort to encourage participants to share openly and freely, emphasis was placed on the confidentiality of the interview through the informed consent letter (appendix 2) as well as at the start of each interview to reassure participants that any sensitive information shared would be retained without any identifiers and would be held securely and confidentially. The efficacy of this was confirmed by the fact that all 13 participants agreed to the recording of their interviews.

4.9   Data Analysis

The interview recordings and supplementary written notes were used to transcribe the interviews to allow for accurate analysis. A thorough approach was used during the analysis through continuous analysing whilst the data was being gathered (Woo et al., 2017).

Through the use of a coding analysis technique emerging themes could be identified and analysed (Mackieson, Shlonsky, & Connolly, 2019). The analysis of the participant responses to each interview question was allocated to distinctive descriptive codes. Through the grouping of codes, the emergence of themes was brought to the fore which were then analysed and interpreted in connection to the literature and in relation to the research objectives.

The data analysis used thematic and frequency techniques to determine and identify themes and the prevalence and commonality thereof. Thematic analysis of data identifies categories or patterns within the large amount of data collected (Hsieh & Shannon, 2005). Identifying themes provides the ability to report data in a succinct and understandable manor. Coding saturation can be identified when the rate of new theme creation declines. This technique enabled the identification of when saturation was reached which took place after 13 interviews, at which time no new themes emerged.

The frequency analysis was used to identify how often themes emerged within a single interview as well as across each of the interviews. In using this technique, common factors were identified through the shared experience of individuals who have transitioned from managing self to managing others. Furthermore, in using

frequency analysis the prevalence of emergent themes could prove indicative for future research.

The process of thematic analysis involved principles of (1) familiarising yourself with the data, (2) generating initial codes, (3) searching for themes, (4) reviewing themes, (5) defining and naming themes and (6) producing the report (Braun & Clarke, 2006). Each of these principles of analysis required a high level of accuracy and considered effort to ensure reliable and accurate data was reported. The process of data analysis was conducted over a period of five weeks with continual review and rigour to ensure the quality of the research outcomes. The thoroughness and rigor of the analysis resulted in each interview analysis lasting approximately three to four hours.

During the analysis of each interview, every question was carefully reviewed to identify emergent factors. As most of the questions were open-ended, responses often included lengthy explanations and additional information to provide context to the response. In analysis the responses, interpretation of meaning was used to identify codes which were later categorised into themes. After every third interview conducted and transcribed, the analysis of those interviews was conducted. The codes were compiled into tables which were later refined on completion of the analysis through the use of the reports generated from the analysis software ATLAS.ti. To conclude the analysis process, the themes were evaluated in relation to the frequency reported, providing the necessary insights that were gained through the data collection process.

4.10 Quality Controls

As defined by Saunders and Lewis (2018), validity is the "extent to which (a) a data collection method or methods accurately measure what they were intended to measure and (b) the research findings are really about what they profess to be about" (Saunders & Lewis, 2018, p. 134). The authors further define reliability as the "extent to which data collection methods and analysis procedures will produce consistent findings" (Saunders & Lewis, 2018, p. 135). To standardise the data collection process, the design of appropriate questionnaires, the conducting of consistent

interviews with all participants, and the avoidance in navigating participants to pre-determined conclusions was sought throughout the interview process.

The thorough preparation prior to data collection and the use of a pilot interview ensured appropriate and suitable questions were asked in order to gather reliable and valid data (Morse, Barrett, Mayan, Olson, & Spiers, 2002). The pilot interview was able to test the validity and reliability of the semi-structured interviews and where required, resulted in interview guide revisions before the participant interviews commenced. Furthermore, the selected process of analysis, interpretation, and representation was appropriate for the proposed research (Roulston, 2010).

4.11 Research Limitations

The research approach which relied on semi-structured interview data collection methods has resulted in a number of research limitations which need to be noted when considering the outcomes of the research.

- Inexperience in conducting research interviews may have influenced the data collection and result in observer error and interview bias (Saunders & Lewis, 2018).
- Considering the research was conducted with a purposive, homogenous sample it cannot be viewed as a representation of the population and therefore no sweeping generalisations can be made from the research results.
- The virtual platforms used for interviews may have restricted the level of information shared by the research participants which could have led to insufficient data and a decrease in the quality of information shared (Lub, 2015).

CHAPTER 5: RESULTS

5.1   Introduction

The purpose of the study was to gain an understanding of the factors that influence the successful transition from managing self to managing others. Data was collected to gain insights into the challenges faced and influencing factors that positively impacted the transition.

The data collection was conducted through semi-structured interviews with the interview questions developed in alignment to the research questions presented in chapter 3. The opening questions of the interview provided data of participants industry, tenure in their management role and to ascertain if they had been appointed to the management role internally, therefore promoted, or externally from another organisation. The participants were then asked to identify the biggest challenges they faced when they first transitioned into their management role as well as what helped them the most at this time. These two questions were purposefully asked at the start of the interview to allow participants to answer without thematic influence.

5.2   Description of the Sample

A total of 13 interviews were conducted using judgemental and convenience sampling methodology. To ensure the participants were able to recollect and share the detail of their experiences, each interviewee was in their first management role and had been in this position between two and 19 months. Of the participants, nine had been promoted to their management role from within the company and four participants joined the company in the management role from an external employer. The industry sectors of the interviewees comprised six participants from Financial Services, one from Retail, one from Fintech, two from Information Technology (IT), one from Telecommunications, one from Education and one from Fast Moving Consumer Goods (FMCG). Participants from the various industry sectors provided the opportunity to identify common themes across these industries. The details are shown in the table below.

Table 3: Participant Details

No.	Job Title	Industry	Tenure as manager (months)	Internal/ External Appoint- ment
1	Financial Manager	Financial Services	5	External
2	Manager: Culture, Engagement & Wellbeing	Financial Services	14	Internal
3	Learning Manager	Retail	15	Internal
4	Product Owner	Fin-tech	19	External
5	Solutions Manager	IT	6	Internal
6	Data Science Manager	IT	2	External
7	Client Support Manager	Financial Services	11	Internal
8	Team Leader	Financial Services	11	Internal
9	Head of IT	Telecommunications	16	Internal
10	School House Director	Education	12	Internal
11	National Capability Manager	FMCG	14	External
12	Senior Scrum Master	Financial Services	4	Internal
13	Assistant Company Secretary	Financial Services	16	Internal

The semi-structured interviews provided the opportunity for interviewees to share their experiences of the transition to their first management role, identifying challenges and the elements of support that assisted them to transition successfully. Interviews were conducted over technology platforms, namely Zoom and Microsoft Teams, through video calls and lasted between 26 and 61 minutes in duration. All interviewees were visible through the video functionality which increased the ability for the interviewer to read facial expressions and body language. All interviewees agreed that their interviews be recorded for transcription purposes. Recordings were independently transcribed by a professional transcriber and uploaded to ATLAS.ti programme which was used to analyse the data using thematic and frequency analysis techniques.

Table 4: Interviews and Duration

Description	Quantity
Number of Interviews	13
Total duration of Interviews	464.21 minutes
Average duration	38.68 minutes
Shortest interview	26.47 minutes
Longest interview	60.57 minutes

5.3 Presentation of Results

The presentation of the results is shown in relation to each research question as presented in chapter 3.

5.3.1 Results of Research Question 1: Identification of the challenges faced by individuals when transitioning from managing self to managing others.

The interviews questioned participants to identify the biggest challenges they faced when transitioning to their first management role. The purpose of this question was to identify the elements that were a challenge to individuals and limit the ability to successfully transition to management. The challenges that were identified were varied and are condensed into six themes which were derived from 20 codes.

Table 5: Biggest Challenges Faced during Transition to Management Role

Themes	Frequency	Interviews
People management skills	14	2,3,4,5,7,9,11,13
Change in mindset	9	1,3,5,8,11,12,13
Lack of guidance	6	1,3,9,10,13
Moving from colleague to manager of others	4	1,4,8,12
Workload	2	5,9
Subordinates resistant to change of management	2	1,11

The most frequent challenge faced was centred on the lack of **people management skills**. This comprised of challenges such as knowing how to manage different personalities, delegation skills, poor performance and creating a cohesive team.

The following quotes relate to the challenge of **people management skills**:

> *"I think dealing with staff that don't have the same personality as you, I really struggled with that." (Int2)*

> *"I still find it very difficult to kind of step back and not always assist." (Int4)*

> *"I found it very difficult to use that authority that I had been given." (Int4)*

> *"I can't expect people to deliver in exactly the same way that I would deliver." (Int5)*

> *"Underperformance, or not even underperformance, but people just not performing up to the level where they should be or could be, I think some of those conversations are very difficult." (Int7)*

Participants indicated challenges of coming to terms with the fact that as a result of the transition to a manager of others, they were now responsible and accountable for others' performance, development and wellbeing. The struggle of moving from being a technical specialist to a manager of people was identified as a challenge. The theme descriptor is that of a **change of mind-set** and was the second most frequent challenge identified by participants.

The following quotes relate to the challenge of the **change of mind-set**:

> *"I never wanted to be a manager; I've always wanted to be a specialist." (Int3)*

> *"People that are now that are now my responsibility - as previously the only thing that was my responsibility was my tasks, but now I have to really manage my tasks, manage the people as well as their efforts." (Int12)*

The **lack of guidance** was identified as a challenge with the third highest frequency. Participants mentioned a lack of management guidelines, management training and support attributed to this challenge that they faced.

The following quotes relate to the challenge related to the **lack of guidance** received:

"It was pretty much, figure it out as you go." (Int1)

"There was no structure. There was no framework in how things were done." (Int3)

"There was no new manager training that I was provided, which I think is a big gap." (Int13)

5.3.2 Results of Research Question 2: Identification of the factors that are perceived to assist the transition from managing self to managing others

The research participants were asked to identify the factors that had helped them most while transitioning from managing self to managing others. The open-ended question had the aim of identifying the most helpful factors the participants experienced and the responses resulted in categorisation of six themes derived from 14 codes. The frequency analysis was used to determine commonalities and identify the most prevalent factor.

Table 6: Most Helpful in the Transition to Management

Codes/Themes?	Mentions	Interviews
Guidance and support from others (internal)	6	1,2,6,7,8,11
Line management support	5	1,6,7,11,13
One's own ability and efforts	5	1,3,3,4,13
Training and development	3	3,5,12
Knowing the business and team members	2	8,9
Company culture	1	5
Guidance from predecessor	1	10

Participants indicated that the **guidance and support received from others** within the organisation as the most helpful in their transition to management. Support was received from peers, senior management, directors, subordinates and teams.

The following quotes relate to the **guidance and support received from others** received:

> *"They [senior managers] would share hints and tips here and there when they could see people, especially those that have made the manager transition, feeling the burn." (Int1)*

> *"I think my peers, the other managers that work with me, have the same staff problems that I deal with. So, it's just having a chat to them and seeing how they would have dealt with this particular situation and then either guiding me or just giving me their own scenario of what happened to them." (Int2)*

Line management support was a high-ranking theme that emerged throughout the interviews. Regular engagements, support and understanding received from line managers were mentioned by participants.

The following quotes relate to the **line management support** received:

> *"I did have a manager who was very supportive in the process." (Int1)*

> *"On a weekly basis we had check-ins just with the head of the team." (Int7)*

The participants also referred to their **own abilities and efforts** in that they could draw on their past experiences or rely on their own efforts in gaining skills or insights they needed to effectively manage and cope with the transition from managing self to managing others.

The following quotes relate to the **own abilities and efforts** of the participants:

> *"Sheer grit and determination." (Int1)*

> *"I always ask myself in how I treat people and how I engage with people and say, is what I'm doing something that I would appreciate if someone else was doing to me." (Int3)*

In a closed question, interviewees were asked to rate the positive impact of factors that could have had an impact on the transition to a management role. Six factors were identified which include (1) formal training and development, (2) informal training and development, (3) line manager's support, (4) opportunities to put new

skills into practice, (5) guidance and learning from others outside of the organisation, and (6) their own efforts.

Table 7: Participant Ranking of Positive Impact on Transition to Management

Factors	1 No impact	2 Low impact	3 Moderate impact	4 High impact	5 Substan-tial impact
Formal training and development	2 15.4%	5 38.5%	3 23.1%	2 15.4%	1 7.8%
Informal training and development	0 0.0%	1 7.8%	3 23.1%	3 23.1%	6 46.2%
My line manager's support	0 0.0%	1 7.8%	3 23.1%	2 15.4%	5 38.5%
Opportunities to put new skills into practice	0 0.0%	0 0.0%	2 15.4%	6 46.2%	5 38.5%
Guidance and learning from others outside of the organisation	1 7.8%	1 7.8%	7 53.8%	4 30.8%	0 0.0%
My own efforts	0 0.0%	1 7.8%	2 15.4%	4 30.8%	6 46.2%

To assist in interpreting this table a rank ordered table (table 8) below shows the data in the columns above "none" and "low impact" combined and "moderate" and "high impact" combined.

Table 8: Ranked Factors that had a Positive Impact on the Transition from Managing Self to Managing Others

Factors	1-2 None to low impact	3 Moderate impact	4-5 High to Substantial impact
Opportunities to put new skills into practice	0 0.0%	2 15.4%	11 46.2%
My own efforts	1 0.0%	2 15.4%	10 30.8%
Informal training and development	1 0.0%	3 23.1%	9 23.1%
My line manager's support	1 0.0%	3 23.1%	7 15.4%
Guidance and learning from others outside of the organisation	2 7.8%	7 53.8%	4 30.8%
Formal training and development	7 15.4%	3 23.1%	3 15.4%

The highest ranked factor that participants felt provided the most positive impact to their transition to management was the ability to put new skills into practice. This was closely followed by their own efforts. Participants identified their self-drive to perform, ability to take their own initiative to learn within the management role, as well as the ability to self-reflect when they faced challenges. The third highest ranked element which had a high to substantial positive impact on the transition to management was informal training and development followed by participants line manager's support.

Mixed results were received with regard to the impact of guidance and learning from others outside of the organisation with four participants having outside mentors or knowledgeable family members who provided valuable guidance. The least ranked factor was formal training and development which is likely attributed to the lack of formal training and development received by participants which is highlighted in section 5.3.3, table 9 below.

5.3.3 Results of Research Question 3: Identification of which organisational inputs are perceived to be the most helpful when transitioning to a first-time manager

To determine the organisational inputs that participants perceived to be most helpful, questions posed to the participants focused on (1) formal training and development and (2) informal training and development. Information was solicited to understand if the organisation afforded opportunities of this nature to participants and which of those were found to be most valuable to the transition from managing self to managing others.

Out of all the participants interviewed, five indicated that they had received formal training and development and all 13 interviewees indicated they had received informal training and development. The low number of recipients of formal training and development can be linked to the low ranking of impact on the transition to management as discussed in section 5.3.2, table 7 and table 8.

Table 9: Formal and Informal Training and Development

Number of participants who received <u>formal</u> training and development	Number of participants who received <u>informal</u> training and development
5	13

The types of formal training are outlined in Table 10. The interventions identified shows two long-term facilitated academic degrees, one facilitated short-course and one formalised mentorship programme which was facilitated internally within the participants' organisation.

Table 10: Types of Formal Training and Development Received

Type	Frequency	Interviews
Post graduate diploma in business management	2	1,12
Short course	1	5
Formalised mentor (internal)	1	10
Master's in business management	1	6

The types of informal training are outlined in Table 11 below. The most frequent informal training and development received was that of guidance from senior management, followed by guidance received from peers internally in the organisation.

Table 11: Types of Informal Training and Development Received

Type	Frequency	Interviews
Guidance from senior management	7	1,4,5,7,9,10,13
Guidance from peers (internal)	5	1,2,8,9,11
Guidance from line manager	3	1,2,11
Informal mentors (external)	3	3,10,12
Informal mentorship (internal)	2	8,12
Job shadowing	2	8,10
360-degree feedback from subordinates	1	5
Informal coaching (internal)	1	1
Open communication	1	6
Reading leadership books	1	7
Support and learning form subordinates	1	11

Participants described the senior management as experienced and knowledgeable leaders who provided guidance to overcome challenging situations. Mention was made of the approachability and "open door policy" that was experienced in this regard.

The following quotes relate to the **guidance from senior management** received:

> *"Receiving a lot of guidance from two of the ExCo members in terms of how to deal with our new challenges." (Int4)*

> *"Our directors even have open line of contact." (Int5)*

Guidance received from peers was a theme that emerged which spoke of the benefits of informal discussions with others who had faced similar challengers before. Emphasis was placed on the fact that peers internal to the organisation were familiar with the context and the environment and could share valuable and appropriate guidance.

The following quotes relate to the **guidance from peers** received:

> *"I think discussion with peers helps the most. I think because they are going through the same situation as me." (Int2)*

"Just having a chat to them [peers] and seeing how they would have dealt with this particular situation and then either guiding me or just giving me their own scenario of what happened to them." (Int2)

When asked to identify which of the formal and informal training and development received was most valuable, ten participants indicated greater value had been achieved through informal training and development and two participants indicated greater value had been achieved through formal training and development. The results are likely attributed to the skewed result of more participants receiving informal training and development than formal. In addition, the results as discussed in section 5.3.2, table 7 and table 8 reflect the high ranking of positive impact informal training had for participants which again can be linked to the fact that they all had received this form of development when they transitioned from managing self to managing others.

Table 12: Most Valuable Informal and Formal Learning Received

Type	Formal/ Informal	Frequency	Interviews
Guidance from senior management	Informal	5	4,5,7,9,13
Guidance from peers (internal)	Informal	3	2,9,11
Guidance from line manager	Informal	2	1,11
Informal mentors (external)	Informal	1	3
Open communication	Informal	1	6
Support and learning form subordinates	Informal	1	11
Formalised mentorship	Formal	1	10
Post graduate diploma in business management	Formal	1	12

5.3.4 Results of Research Question 4: Understand which line manager's actions help the transition to being a first-time manager.

The interviewees were first asked what their line manager did well to support them in the transition to management and secondly what more could their line manager have done to support them further. The most common positive traits that were valued from line management is the lack of micro-management and the support they provided.

Table 13: What Line Managers Did Well in Supporting the First-time Manager

Theme	Mentions	Interviews
Did not micro-manage	6	2,3,4,8,9,1
Supportive	5	1,6,7,8,9
Approachable	4	1,5,11,13
Collaborative	2	10,11
Transparency	2	5,13
Calm in stressful situations	1	2
Provided coaching	1	13
Empowering	1	13
Well prepared	1	10
Regular check-in's	1	1
Regular feedback	1	7
Adapts management style to the individual	1	12
Trusting	1	6

As demonstrated through the frequency analysis, the most common valued support from line managers was the lack of micro-management. Participants appreciated the autonomy this provided and the ability to deliver in their role in the working style they felt most comfortable with, with little interference from the line manager.

The following quotes relate to the **lack of micro-management** demonstrated by line managers:

> *"I think maybe what she did well was really the thing of not micromanaging me."*
> *(Int3)*
> *"She's given me support, and the freedom to operate." (Int8)*
>
> *"He understands the type of person that I am. He knows very well that I don't like being micromanaged." (Int12)*

Participants who identified that they had received support from their line managers valued the fact that their managers could provide assistance when needed and would also provide support in times of adversity.

The following quotes relate to the **support** received from line managers:

> *"Whenever I needed the support, he's always been there to guide me, even from a management perspective, especially when it comes to the processes, which is something that is new to me." (Int12)*

> *"What really motivated me was that he said that he'd support me, and he did." (Int9)*

Approachability of line management was identified in that managers were not only available but encouraged open and authentic engagements. This was valued and appreciated by those participants who benefited from this experience.

The following quotes relate to the **approachability** of line managers:

> *"There was never a point in time where I felt I couldn't approach her." (Int1)*

> *"He's always available, like readily available at any moment." (Int5)*

When asked what more line managers could have done to provide support, seven themes emerged. The highest frequencies highlight the need for additional guidance, increased levels of autonomy and accountability and the need for additional and regular engagements with line managers.

Table 14: What Line Managers Could Have Done to Support the First-time Managers Further

Theme	Mentions	Interviews
Provide additional guidance	5	2,4,6,8,9
Give more autonomy and accountability	3	5,7,9
Hold additional and regular engagements	3	3,9,13
Provide coaching	2	3,9
Provide regular and constructive feedback	2	2,3
Increased levels of strategy planning	1	10

Participants indicated that despite the appreciation for autonomy at times they would have benefited from additional guidance from their line managers.

The following quotes relate to the requirement of **additional guidance** from line managers:

"While the sort of freedom to operate works, a little bit more guidance in the beginning of what I needed to do, instead of saying, dive into it and just learn as you go, I felt would have been a little bit more beneficial, and would be more helpful." (Int8)

"There could have been a little bit more maybe clarity or direction." (Int9)

Three participants felt their line managers stifled them due to the high level of involvement and lack of autonomy provided. There is an indication that this was done in an attempt to reduce errors or underperformance, but in fact hindered development and learning.

The following quotes relate to the need to be **given more autonomy and accountability** by line managers:

"Don't take over what I'm doing, rather give it to me, let me fail by myself." (Int5)

"The space as well to make decisions and take accountability for that." (Int7)

Participants also indicated that their line managers had large workloads themselves which limited the time that could be given to them in order to have additional and more frequent engagements. The participants who raised this, attributed this to factors beyond the line managers control, however, nonetheless was an element that they would have appreciated.

The following quotes relate to the requirement for **additional and regular engagements** with line managers:

"I just wish she had more engagements with me and even if she was not going to add any value, but just to say this is what I see, these are some of the things that we need to think about. Having those conversations would have been very important for me." (Int3)

"She does not always have time to engage with me." (Int13)

5.3.5 Results of Research Question 5: Understand the role played by stretch in the first-time managers' development

In order to gain insights to organisations environment and learning culture, the interviewees were asked if they felt there was an opportunity to implement newly learnt skills in the workplace. In addition, they were asked if they believe there is value in "learning through doing". The questions posed provide an opportunity to understand if stretch assignments or action learning is taking place in organisations. One can also ascertain how much value is placed in this learning method by individuals. There were 11 participants who felt they were able to apply newly acquired skills in the workplace. Three participants attributed this to the lack of micro-management from their line manager. Of those interviewed, ten participants believed there is value in learning through doing whilst three felt that there are positives and negatives to this approach as they felt the implications of making a mistake when managing people could result in severe and damaging consequences.

Table 15: Opportunity to Implement New Skills and the Value of Learning

Number of participants who had the opportunity to implement newly learnt skills	Number of participants who feel there is value in learning through doing
11	10

Participants indicated that the best way to learn was through application and having the ability to learn from mistakes.

The following quotes relate to the **opportunities provided to implement newly learnt skills**:

> *"I was able to apply a number of things, and especially with managing nine people, there's so much that you can explore." (Int3)*

"We always have the ability to apply anything new and we've got the mentality of failing fast, nobody judges you." (Int5)

The interviewees were asked if they felt their organisations valued learning and development as a broad concept and then more specifically if their organisations valued management development. The questions were asked in an attempt to understand if the organisation has a learning culture and how this could potentially affect the transition into management. Eight interviewees felt that their organisation did value learning and seven interviewees felt that their organisations specifically valued management development. For those who did indicate the organisations value of management development, four felt that this was however inconsistently applied in the organisation and was dependent on one's team.

Table 16: Organisation that Values Learning and Management Development

Number of participants who felt organisation values learning	Number of participants who felt organisation values management development
8	7

To further establish if the organisation has a learning culture, interviewees were asked to reflect on the outcomes from making a mistake. All participants indicated that they had made a mistake in their role since transitioning from managing self to managing others and could provide insights to the experiences had thereafter. The responses varied from self and organisational elements. Six participants felt they could take accountability and ownership of the mistake which indicates they felt a level of psychological safety within their organisations. Support and backing received from line managers also were indicated by six of the participants. Following the interviews, two participants felt the organisational culture did not support individuals in making mistakes nor the process of learning from mistakes. This indicates a low level of psychological safety and limits learning and development that can be achieved through making mistakes.

Table 17: Individual Experiences of Making Mistakes within their Organisations

Theme	Mentions	Interviews
Take accountability for the mistake	6	1,4,7,9,10,11
Line manager was supportive	6	1,2,7,8,11,13
Ability to learn from the mistake	3	8,9,12
Received constructive feedback from line manager	3	1,6,8
Company culture does not support making mistakes	2	12,13
Able to have conversations with effected parties	1	5
Able to have conversation with line manager	1	1
Able to have conversations with peers	1	3
Could reflect on the mistake	1	3

The following quotes relate to the **experiences of participants when they made a mistake**:

> *"I think owning it rather than defending it is crucial.***"** *(Int10)*

> *"My management, I think they were very understanding and more willing to just to see it as a mistake and say, ok, let's move on." (Int7)*

> *"We worked through it and we learned, I think, not only as a new manager, but as a team." (Int1)*

> *"the intention is to have the environment feel safe. I would say that the culture is that it's ok to make mistakes." (Int9)*

5.4   Presentation of Results Integration and Conclusion

The results discussed above that have been derived from the data collection and analysis have managed to indicate the individual and organisation factors that have influenced the transition from managing self to managing others.

The results show that transition will positively be influenced by an individual's sense of agency, the openness to learning and change, ability to ask for input and feedback and openness to making mistakes. Individuals efforts which will enable learning and

development and adaptability to change are instrumental to the success of eh transition from managing self to managing others.

The results further indicate the factors that stem from an organisations domain that can equip individuals to transition successfully to managing others. Organisations are required to promote and enable learning, the need to train line managers to coach first-time managers and to promote learning and culture and a psychological safety to promote learning and mistakes.

The individual and organisational factors in the results above are combined and depicted in Figure 5 below which shows the connection between the factors. It demonstrates that all seven factors stemming from both the individual and organisation are required inputs for the successful transition from managing self to managing others.
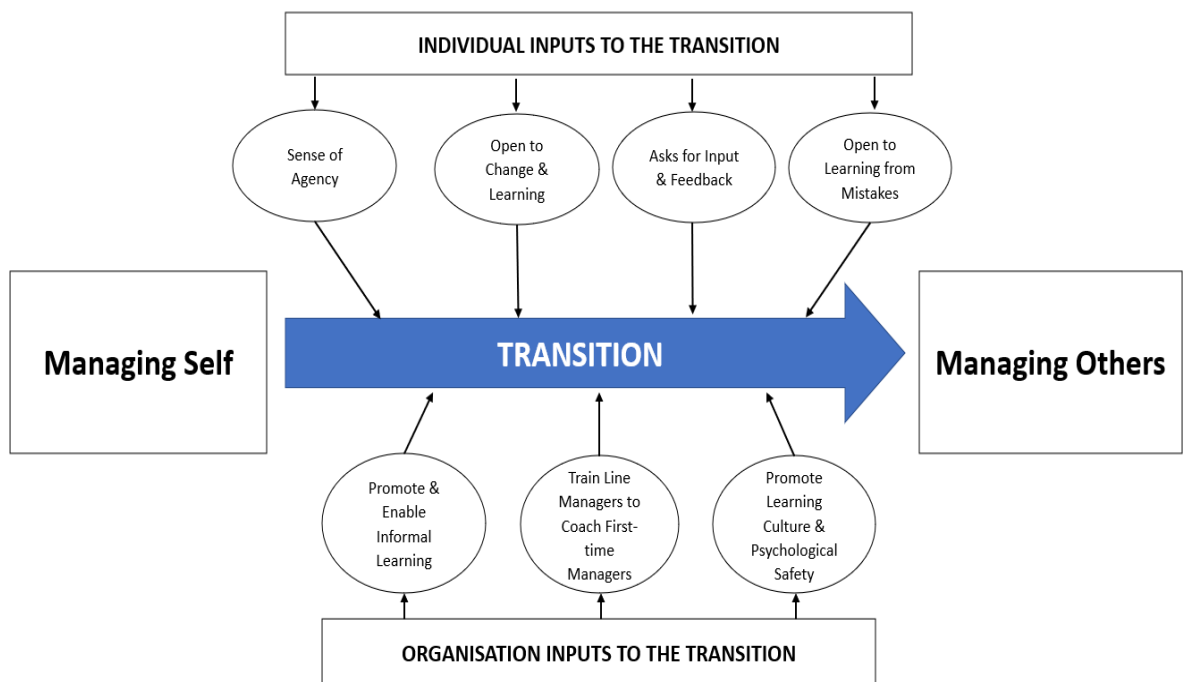
Figure 5: Identified Factors that Positively Influence the Transition from Managing Self to Managing Others

(Authors' own model)

The results outlined in this chapter as well as the above model, Figure 5, will be discussed in further detail in relation to the literature review in Chapter 2. The discussion will discuss the outcomes of the research questions presented in Chapter 3 and provide the details of additional contributions to the field of study.

CHAPTER 6: DISCUSSION OF RESULTS

6.1 Introduction

This chapter will discuss the results presented in Chapter 5 and answer the research questions presented in Chapter 3. The results of each research questions will be discussed in relation to the literature review outlined in Chapter 2 and determine how the research outcomes have contributed to the current literature. The discussion of the results provides insights aligned to the purpose of the research which was to gain and deeper understanding of the factors that influence the successful transition from managing self to managing others.

6.2 Discussion of Results of Research Question 1: Identification of the challenges faced by individuals when transitioning from managing self to managing others.

The results of research question 1 are presented in Table 5, Chapter 5. The aim of the research question was to identify the challenges that are faced by individuals when transitioning from managing self to managing others. The challenges identified provide insights into factors that were a barrier to the successful transition to management. In analysing the data retrieved during the interview process, the different challenges could be identified as well as the most frequent and common challenges experienced by the research participants.

As presented in Table 5, the most frequent challenge faced by the research participants was centred on the lack of management skills required to perform in the management role. Research participants cited challenges such as managing different personalities, building trust with their subordinates, creating a cohesive team, delegating and managing poor work performance. The participants indicated that they had had no previous formal experience of managing people and these elements of the management role attributed to why that was a challenge for them when the transition took place. The need for developing management skills is highlighted within the Leadership Pipeline Model (LPM) framework which indicates that as part of the leadership transition from managing self to managing others there

is a shift in skills requirement (Charan et al., 2010). The literature also refers to the new skills, competencies and attributes required when transitioning from managing self to managing others which included both technical management skills as well as the change to work more collaboratively with others and to demonstrate a team orientated approach (Freedman, 2011). When investigating the inputs required from organisations to the successful transition to managing others, the literature outlines the need for formal and informal training and development. The literature states the need for developing technical skills, conceptual skills and human-relation skills with a larger emphasis on technical skills for first-time managers (Aragon & Valle, 2013; Warnich et al., 2015). The results of research question one show that the lack of management skills was a large contributor to the challenges faced by the participants which supports the literature in that training and development is a relevant input used to ensure the successful transition from managing self to managing others. However, the results are varied in terms of technical skills, conceptual skills and human-related skills and tends to indicate an emphasis towards human-related skills rather than that of the technical skills.

As depicted in Table 5, the second most frequent challenge faced by participants is that of overcoming the change of mind-set required when moving to their first management role. Participants mentioned that moving from a technical specialist to a manager of others required a shift in their mind set in understanding the need to value the work outputs of their subordinates over their own outputs. Placing value on the outputs of others was contrasting to their previous technical role and the shift was seen as a difficult challenge to overcome. Chapter two describes the difficulty of the transition from managing self to managing others and highlights that the transition brings the need for adjusted work values (Charan et al., 2010). Freedman (2011) describes the transition requiring individuals to "let go" of elements from their previous level, of managing self, which further indicates the requirement of a mind-set change. The results presented support the literature as it shows that this is a large challenge experienced at this first leadership transition level.

The third biggest challenge faced by individuals was the lack of guidance the research participants received. Participants indicated the lack of handover from predecessors, the lack of line management support and the lack of supporting processes and guidelines for management was a challenge to their transition to

management. The literature outlines the organisational inputs required to support the transition to management which include informal training and development as well as line management support. The literature describes informal training to be that of on-the-job learning which includes elements such as learning through others (Manuti et al., 2015; Park & Choi, 2016). Furthermore, the literature explores the role of line management support through coaching and mentorship and indicates the positive impact this can have on the transition to management (D'Netto et al., 2008; Turesky & Gallagher, 2011). The results demonstrate that these two elements were a challenge faced by participants which supports the literature in that both informal training and development and the support of line management are factors that influence the success of the transition from managing self to managing others.

The results show the biggest challenges faced by individuals which is in alignment with the current academic theory and literature. The findings reflect the need for skills development with specific focus on human-centred skills. This provides valuable input in emphasising the impact that skills development can have on the transition to first-time management as well as provides the need for focus on human-centred skills specifically. The challenge in the change of mind-set was prevalent and understanding the magnitude of this challenge provides individuals and organisations the opportunity to explore ways to mitigate this in order to positively impact the transition from managing self to managing others. The challenge experienced in the lack of guidance provides valuable insights into the support required from line management. It also highlights the importance of the induction of the individual into the new management role and the need for supportive interventions that can assist in overcoming this challenge.

6.3 Discussion of Results of Research Question 2: Identification of the factors that are perceived to assist the transition from managing self to managing others

Research question two sought to determine what factors the research participants perceived to assist them with the transition from managing self to managing others. The results shown in Table 6, Chapter 5 identify the elements that participants felt provided the most help to them during the transition. The results assist in identifying firstly the factors themselves that had a positive impact the transition to first-time

management and, through the frequency analysis, provides insights into the most common and prevalent factors identified by the research participants.

The results presented in Table 6, Chapter 5 lists the factors that participants identified as the most helpful in assisting them in the transition from managing self to managing others. Table 6 shows the frequency of these factors amongst the participants' responses. The most common factor identified is the guidance and support that participants received from others from within the organisation. Participants mentioned the support they received from senior management, from peers who were operating at a similar level to themselves as well as the support they received from their subordinates. There was particular emphasis placed on the value that the support and guidance received from others, internal to the business, as they were able to provide advice that was contextually appropriate to the environment in which they were employed. The literature shows that informal training, which includes receiving guidance from peers and management, is a factor that influences the successful transition to management (Manuti et al., 2015; Park & Choi, 2016; Warnich et al., 2015). The results are in support of the literature presented.

The second and third most frequently mentioned factors are that of line management support and one's own ability and efforts. The participants indicated that their line managers' support and backing was a factor that helped them transition to management. The support included elements such as regular one-on-one engagements, constructive feedback, imploring the appropriate levels of autonomy and providing support and understandings of the difficulties the research participants were experiencing in the transition from managing self to managing others. The literature describes the role of line management support as a factor required for the successful transition to first-time management (D'Netto et al., 2008; Turesky & Gallagher, 2011) which is further supported by these results.

The theme of one's own abilities and efforts reflects the participants' response that their own initiative to up-skill, acquire knowledge and seek out the required guidance was a factor that helped the transition to management. The concept of agency in learning was identified in the literature presented in chapter two which states that there a reliance on one's self-drive for learning and development as well the trait of collaboration is required for professional development (Strahan, 2016; P. Williams,

2017). The findings support the link towards management development and in addition provides the notion that a sense of agency specifically aids the success of the transition from managing self to managing others.

Other factors identified through the interview process include training and development, knowing the business and team members (due to the participants' previous employment being within the same organisation), supportive company culture, and guidance from the exited predecessor. The literature supports the factor of training and development (Manuti et al., 2015; Park & Choi, 2016) and that of the role of the company culture (D'Netto et al., 2008), however the benefit of being promoted from within the organisation and the external guidance received from an exited predecessor provide additional factors for consideration. The factor of familiarity with the organisational processes and the already formed relationships with the subordinates was mentioned by two participants and indicates that this factor may be one to consider to positively influence the transition to first-time management. This finding is important to note as out of all the research participants interviewed, 69.1% of them were promoted from within their organisations which reduces the sample size able to potentially identify this as a helpful factor contributing to the success of the transition.

The research participants were asked to rank pre-determined factors, independently of each other, on the level of positive impact they had on their transition to management. The results presented in Table 7 and 8 show the following factors, in order of highest impact to lowest impact, as (1) opportunities to put new skills into practice, (2) their own efforts, (3) informal training and development, (4) their line managers support, (5) guidance and learning from others outside of the organisation and (6) formal training and development.

The results show that the first four factors described above as having the highest impact on the transition to management. This provides a contribution to the current literature as it provides an indication of which factors were most valued and could therefore indicate the prioritisation or emphasis to be placed on the different factors by both individuals and organisations in aiding the transition from managing self to managing others. However, the factors that were ranked moderate and low, namely guidance received from others outside of the organisation and formal training and

development, were likely impacted due to some of the research participants either not having received formal training and development or had not received guidance from those outside of the organisation. The low rankings of these factors therefore do not accurately portray the impact or lack thereof in these two factors to the transition to first-time management. Results presented in section 6.4 in relation to research question 3 provides further detail relating to training and development received by participants and will further support this finding.

The results provide valuable insights into which inputs can impact the success of the transition from managing self to managing others as well as which have had the most impact. The support from others highlights the value of fostering internal stakeholder relationships which can be leveraged to provide positive support and guidance to individuals who are transitioning to management. The positive impact received from line management support is noteworthy. The details described by the research participants provide further valuable insights towards understanding the actions and approaches line managers can take in their support given to first-time managers. In understanding that an individual's sense of agency was an enabler to management transition provides an emphasis to this attribute. Individuals are able to understand the importance of personal drive and effort that they need to apply in order to positively influence the transition from managing self to managing others. Furthermore, through the ranking of factors to determine the level of impact they had on the management transition, these results support the elements described above and again provides areas of focus for both individuals and organisations.

6.4 Discussion of Results of Research Question 3: Identification of which organisational inputs are perceived to be the most helpful when transitioning to a first-time manager

Research question 3 hoped to identify which organisational inputs were perceived to be the most helpful when transitioning from managing self to managing others. The questions asked to research participants were focused on the organisational inputs centred on training and development and sought to identify those inputs that had been received and of those which were perceived to be most helpful.

The results shown in Table 9, Chapter 5 state that five of the participants received formal training and development and all 13 participants received informal training and development. The formal training received included academic and skills-based, lecture and facilitator-led interventions as well as a formalised mentorship programme. The informal training and development received included elements of informal guidance and coaching, acquiring knowledge through reading leadership books, soliciting feedback and job-shadowing. The literature presented in chapter two highlights the need for informal and formal training and development in that it is a required factor to support the transition to first-time management which is supported by the types of training and development received by the participants (Aragon & Valle, 2013; Manuti et al., 2015; Park & Choi, 2016; Warnich et al., 2015).

The research participants were asked to identify what they perceived to be the most valuable informal or formal training and development that they received in relation to their transition from managing self to managing others which is presented in Table 12. It is noteworthy that only 38.4% of the research participants were afforded the opportunity of formal training and development. The lack of formal training and development received will have potentially influenced the frequency analysis of these elements scoring highly in perceived value in relation to the number of valued informal training and development elements of which 100% of participants received. This supports the findings discussed in section 6.3. In addition, not all participants had received all forms of informal training and development. Therefore, even though Table 12 shows the frequency of participants indicating the highest value, these results provide an indication of the most commonly received and valued elements of training and development however will require further research and analysis. The results reflect that six types of informal training and development were valued by participants with the most valued interventions being the guidance received from others internally from senior management, peers and line managers. Two types of formal training were valued by the participants which included the value derived from a post-graduate academic programme and that from the formalised mentorship programme. The results provide additional information in understanding the types of organisational inputs, specifically relating to training and development, that are being received and identifies where there may be potentially more value derived from some inputs over than others.

The results show us that amongst the research participants there was more forms of informal learning taking place than that of formal. There is an indication that guidance from others was most common and highly valued. The results do indicate a lack of formal development which shows a potential gap of training and development provided to those transitioning to management which t organisations could aim to increase in the future. It is apparent that learning is taking place informally which provides valuable insights for organisations which can look to focus their efforts to enhance and enable this type of learning for those who are transition from managing self to managing others.

6.5 Discussion of Results of Research Question 4: Understand which line managers actions help the transition to becoming a first-time manager

Research question 4 set out to explore which line managers' actions the research participants felt helped them the most when transitioning from managing self to managing others. The participants were asked how their line manager helped them at the time of their transition as well as what they thought their line manager could have done more of to assist them.

The literature presented in Chapter 2 outlines that the support of a line manager is a necessary factor contributing to the development and support of subordinates during their transition from managing self to managing others (D'Netto et al., 2008; Turesky & Gallagher, 2011). The results shown in Table 13 provide additional insights into the particular actions that were taken by line managers that had a positive impact for the participants in their transition from managing self to managing others and thus contributes additional information to the current literature. The top five most frequent actions that were found helpful by the research participants were (1) lack of micro-management, (2) providing support, (3) being approachable, (4) having a collaborative approach and (5) having a high level of transparency.

To attain further insights into which actions of line managers may help those transitioning to first-time management roles, the participants indicated what more they would have wanted their line managers to do to assist them at this time. Table 14 shows a variety of actions that were lacking from the participants line managers.

As these results are largely depended on the individual experiences which were impacted by the varying levels of line management support they received, all elements should be reviewed in contributing to the area of study. The frequency reported in Table 14 does however indicate the most common actions that were lacking from line management and could indicate the development of middle-management has increased focus on these elements. The top five most frequently identified actions that were lacking from the participants line managers at the time of transition was (1) the need to provide additional guidance, (2) giving additional autonomy and accountability, (3) conducting additional and regular check-in meetings, (4) provide coaching and (5) providing regular and constructive feedback. These results are closely aligned to those that were identified as the most helpful actions received which further indicates the importance of these line management actions in aiding the successful transition of their employees to their first line-management position.

The results provide details of the actions that are helpful and valuable to newly transitioned managers. The results provide line managers detailed information as to what their subordinates need from them. Organisations also have an indication of what elements of development the line managers may need to support those who are transitioning from managing self to managing others.

6.6   Discussion of Results of Research Question 5: Understand the role played by stretch in the first-time managers' development

Research question 5 sought to gain a deeper understanding of how inputs from the organisation, in terms of organisational culture and work-place environments, that could enable the participants to learn on-the-job through delivery of unknown tasks or stretch assignments. In addition, the individual's learnability was also explored through identifying if the participants themselves valued learning through application as well as gaining insights to their individual attitudes towards risk and their learning propensity. Stretch assignments often rely on both the organisation to provide an opportunity for such learning as well as an individual's willingness to take on assignments with little to none experience. An individual's ability to view the

opportunity as a valuable learning experience may drive motivation and overcome uncertainty which may be felt when presented with a stretch assignment.

The participants were asked if they felt they were able to implement new skills at the workplace which in Table 15, Chapter 5 show that 11 of the 13 participants answered affirmatively. This result indicates that the organisation is open to new ways of working and/or supports the implementation of newly acquired skills. The literature presented in Chapter 2 outlines the Experiential Learning Theory which shows that one of the four stages in the Learning Cycle is "Active Experimentation" (Kolb & Kolb, 2017). The theory explains that all four stages are essential for effective learning (Kolb & Kolb, 2017). The results show that most of the participants are in organisations that enable the application of learning which supports the literature describing the key principles of adult learning (Arghode et al., 2017; Becker & Bish, 2017). The literature also states that stretch assignments (on-the-job learning) provides the opportunity for newly learnt skills to be integrated in the workplace which is a requirement for learning (Hezlett, 2016; Subramony et al., 2018).

Table 15, Chapter 5 also provides the results that 10 of the 13 participants felt there is value in learning through doing. The research participants made mention of the importance of applied learning and that it is essential to the learning process. Similar findings were seen in previous research which showed high value being placed in this method of learning (Becker & Bish, 2017; Hezlett, 2016; Subramony et al., 2018).

To further analyse how the culture and environment was a contributing factor to the successful transition from managing self to managing others the participants were asked to indicate if they felt their organisations valued learning and then more specifically, if they valued management development. The results presented in Table 16, Chapter 5 show that 61.5% of the participants felt that their organisations valued learning and 53.8% of the participants felt that their organisations valued management development specifically. In addition, more than half of those who indicated their organisations valued management development said that this was inconsistently demonstrated and was dependent on which department of the organisation one was working. The research participants mentioned the lack of time afforded to employees for training and development initiatives as well as the lack of investment towards training and development. The literature describes a learning

culture of an organisation which places value on learning development, which is demonstrated through affording employees necessary time to attend training programmes and who invests financially in training programmes and initiatives (Aragon & Valle, 2013; Warnich et al., 2015). The results indicate a relatively low level of a learning culture experienced by the participants which could have negatively impacted the employees the ability to develop and learn.

The participants were asked to share their experiences of when they made a mistake in their new management role and to reflect on the aftermath in terms of their line manager and the organisations reaction. All participants stated that they had made a mistake in their new management role. The results shown in Table 17, Chapter 5 present eight themes that emerged which demonstrated a positive reaction from the mistake. The frequency shown of the responses in Table 16 show the most prevalent outcomes or reactions were that (1) the participants were able to take accountability and "own" their mistakes and (2) the participants had received their line managers support and backing in the aftermath of the mistake being made. The participants further indicated that they were able to reflect and engage with others following the mistakes being made in an attempt to rectify and learn from their mistakes. These responses indicate the psychological safety and learning culture of the organisations which supports learning and development, enabling the successful transition from managing self to managing others (D'Netto et al., 2008; Kolb & Kolb, 2017). In contrast, two participants indicated that their organisational culture did not support making mistakes and that they experienced extreme levels of fear and stress when making mistakes. The sentiment indicated that a lack of learning was taking place through this means and that an unhealthy culture was emerging which included elements of blame, hiding mistakes and dishonesty. The previous research described in chapter two states that promoting an environment that encourages learning through mistakes is necessary for management development (Weinzimmer & Esken, 2017).

The results show that being able to apply newly learnt skills and learn through doing is valued by newly transitioned managers. However, the results also present a relatively low levels of organisations placing value on learning and management development. A learning culture plays a role in enabling learning and will require efforts from organisation to demonstrate their value of this through investments and

affording employees time towards their development. The participants indicated levels of safety to make mistakes, however the few who did not have provided the stark reality of how not having this safety can be detrimental to the culture of the organisations and one's ability to learn and development. Organisations will require concerted efforts to promote and retain the trust and psychological safety of their employees.

6.7 Conclusion

The discussion of the results shows that the outcomes of the research support the elements of the literature review presented in Chapter 2. Firstly, it supports the notion that in order to successfully transition from managing self to managing others there is a change experienced in skills, value adjustment and time application (Charan et al., 2010). Further to this, the stakeholders of career development were apparent in that the success of the transition is reliant on both the individual and organisation (Arghode et al., 2017; Becker & Bish, 2017; Manuti et al., 2015; Turgut & Neuhaus, 2020).

People management skills was a common challenge experienced by the participants. Through analysing the data, it was apparent that the requirement for the development in human-centred skills was most needed, over that of technical management skills and conceptual skills. This finding was contradictory to the research conducted by Aragon and Valle (2013) which state that the transition from managing self to managing others requires a focus on developing technical management skills and less focus on human-centred and conceptual skills. It is apparent in industry reports that the future skills needed require a focus on human-centred skills, however there is little academic research supporting this (World Economic Forum, 2018).

The results also supported the need for the different types of training and development, namely informal and formal learning. Informal learning opportunities were largely received and highly valued by the research participants. Formal learning opportunities were lacking from the experiences of the research participants which meant that the results were unable to determine a comparative review between the two types of learning. The results were able to determine the types of formal and

informal training interventions and identify which were valued by participants. The results indicated that a valuable contribution to informal learning was that of receiving guidance from others from within the organisation.

The need for line management support is supported by the results of the research. Research participants confirmed that their line managers' support helped them in the transition which supports the literature presented in chapter two. The research was able to identify details of the actions line managers should perform when supporting the newly transitioned managers which include providing guidance, coaching and regular and constructive feedback as well as taking the time to engage more regularly with their newly transitioned managers.

The results show that the organisations learning culture and safe environment are necessary for learning to take place. This supports the indication from literature that organisations should promote learning through doing and enable experiential learning (Kolb & Kolb, 2017), as well as drive a culture that encourages learning from mistakes (Becker & Bish, 2017; Weinzimmer & Esken, 2017).

The importance of individuals drive and agency for taking proactive actions and for learning was highlighted in the results of the research. This ability in individuals can be seen to underpin and aid all types of learning and support required for the successful transition from managing self to managing others. The literature indicates the need which has been supported by the results (Strahan, 2016; P. Williams, 2017). However, the importance of this factor was made apparent and indicates that without this element in place, the factors contributing to the transition would have been unsuccessful.

CHAPTER 7: CONCLUSION

7.1 Introduction

Chapter 1 provided an overview of career development and leadership transitions and indicated that the transition from managing self to managing others still proves challenging despite the research that has been conducted thus far (Ashkenas, 2015; Charan et al., 2010; Freedman, 2011; Griffith et al., 2019; Lipman, 2016; Plakhotnik, 2017). The importance of the successful transition to first-time management was highlighted considering the negative impact the unsuccessful transition could have on future leadership transitions (Charan et al., 2010). The complexity of the business environment also emphasised the increased complexity and importance of ensuring one's successful transition from managing self to managing others (Snowden & Boone, 2007; Uhl-Bien & Arena, 2017).

Chapter 2 explored the research conducted in this field in more detail and was able to determine individual and organisational factors that positively influence the transition from managing self to managing others. In understanding the individual inputs, the literature showed that (1) an individual's learning is enhanced through experiences, (2) an individual's sense of agency in terms of learning is needed and (3) an individual's ability to overcome resistance to change can positively influence their career development. The organisational inputs identified through the literature were that of (1) providing management training and development through both informal and formal learning, (2) driving a learning culture and safe environment to learn from mistakes and (3) the line managers support, all of which can positively influence the transition.

Having determined the need for further knowledge in the field of study, the importance of a successful transition and the insights of what is already known, the purpose of the research was to understand the challenges faced by first-time managers and to gain a deeper understanding of the factors that influenced the successful transition from managing self to managing others.

7.2   Integration of Research Findings

The qualitative research approach used resulted in 13 semi-structured interviews taking place with individuals who had recently transitioned from managing self to managers others. The interviews were designed to gain an understanding of the challenge's individuals had faced in the transition to first-time management and also to understand what inputs had positively influenced their transition.

The data was gathered and analysed using thematic and frequency methods. The analysis of results was able to identify the most prevalent challenges experienced by individuals during the transition to first-time manager, namely people management, the values adjustment and the uncertainty and uneasiness of making mistakes. The challenges faced with people management involved mostly human-centred factors as well as some technical management skills. The values adjustment challenge included individuals grappling with the new levels of accountability and responsibility that comes with managing others and the shift in valuing outputs through others. Participants were also challenged through facing unknown situations that without guidance could lead to making mistakes.

The results were also able to identify both individual and organisational inputs that will influence the successful transition from managing self to managing others. The inputs from individuals where that of (1) a sense of agency in that one is required to have an inherent determination to overcome challenging situations and be comfortable with the unknown. The input of (2) being open to change and learning in that they are required to accept guidance and advice from others and the awareness that the change in level will bring with it the requirement for development. Individuals will also be required to (3) solicit input and feedback from others and (4) be open to learning from mistakes.

The inputs from organisations where that of (1) promoting and enabling informal learning through enabling peer engagements and/or creating structured coaching and mentorship opportunities. The organisational input of (2) training line managers with coaching skills will enable line management to fulfil the need to provide coaching and support to the first-time managers. The organisation will also provide an input to the successful transition by (3) promoting a learning culture that is open to

experiential learning and promoting a psychological safe environment that encourages learning from mistakes.

The model presented in Figure 5, Chapter 5, has been adapted to reflect the disruption experienced and the challenges faced by individuals during the transition from managing self to managing others. The inputs from both individuals and organisations are represented as the inputs that are required to achieve a successful transition.

The revised model, Figure 6, provides an overview of the challenges and provides individuals and organisations an overview of the complexity that comes with the management transition and can be used to identify input gaps.

The central arrow presented in Figure 6 represents the transition period from managing self to managing others. The zig-zag lines at the start of the transition period, indicate the disruptive experience of moving into a position which demands unfamiliar competencies. The model shows three challenges that are presented in the transition period which have been derived from the research results. The first challenge is "making mistakes". The results show that when one transitions from managing self to managing others, there are large gaps in knowledge, skills and attributes for the individual who are experiencing elements of the role for the first time. There is a challenge in being firstly comfortable with making mistakes but also being able to derive learning value through making these mistakes. Learning through uncomfortable situations will be necessary when embarking on stretch assignments as these are unfamiliar and require competencies that are yet to be developed.

The second challenge represented in the model is "values adjustment". The results of the research identified that it was a challenge for individuals to change their mind-set in valuing the outputs through others rather than through themselves as individual contributors.

The third challenge represented in the model is that of people management skills. The results indicated this is a challenge for those transitioning to management and that the new needs of the role were hard to overcome due to the inexperience, lack of knowledge, and lack of skills in managing others.

The individual, or first-time manager, inputs are shown in the model as 4 contributing factors. The first input is a "sense of agency". As discussed previously, the individual's sense of agency is a necessary input to the transition to pro-actively seek opportunities for learnings and ability to be comfortable in facing challenges. The second input is that of being "open to change and learning". To overcome the challenges presented, the individual is required to embrace the change they are experiencing and be open to learning. The third input is for individuals to "ask for input and feedback". This is a vital element for learning on the job and soliciting inputs from others. Line managers, peers and senior managers may not pro-actively provide inputs and feedback which have been indicated to be valuable inputs to the transition which requires the first-time manager themselves to encourage this for their own learning needs. The fourth and last input is that of the individual being "open to learning form mistakes". The results show that mistakes are likely to be experienced by first-time managers and there is high value in using the mistake as an experiential learning moment to enhance their abilities in their new role.

The organisational inputs have been presented in three factors in the model. The first is to "promote and enable informal learning". The results presented a strong indication that informal learning was effective and valued by newly transitioned first-time managers. The second factor is "train line managers to coach first-time managers". The results showed that the most helpful and valued support from managers included elements associated with that of coaching. The support from line managers was indicated as a key input that assisted individuals with the transition from managing self to managing others and therefore line managers will require to be equipped to fulfil this need. The third and final input from organisations is to "promote a learning culture and psychological safety". The results emphasised the importance of learning that is required to overcome the challenges faced by individuals during the transition and impact psychological safety can have in enabling one to learn through doing and to learn through making mistakes.

All factors presented in the model from both the individual and the organisation will influence the challenges faced during the transition from managing self to managing others.
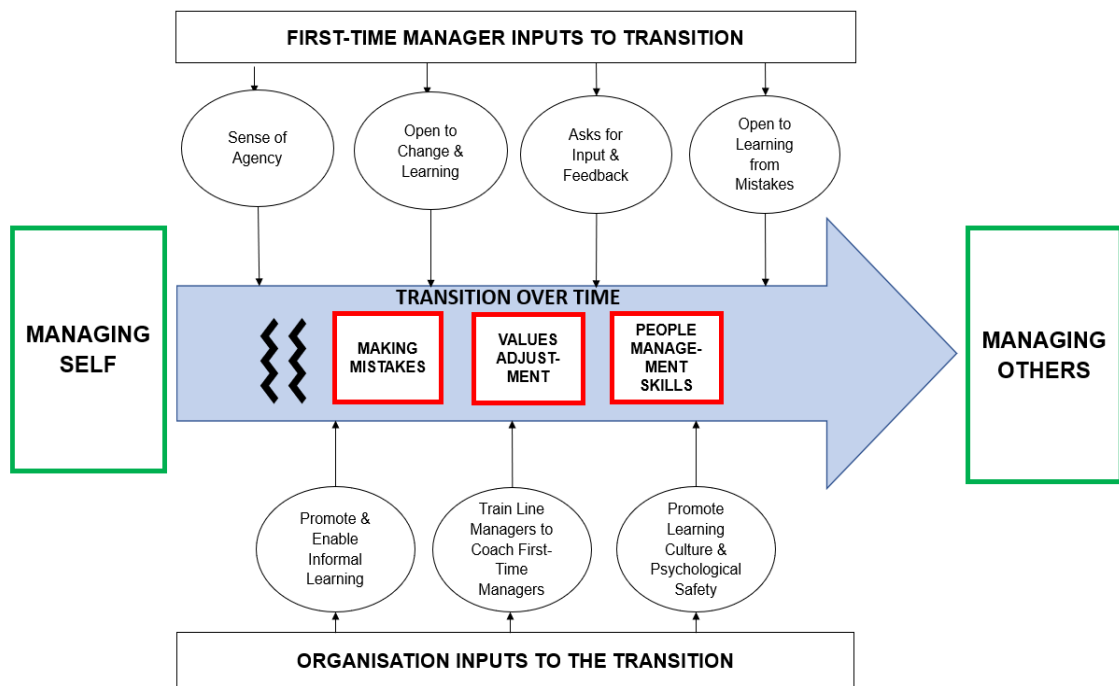
Figure 6: Influencial Inputs to the Succesful Transition from Managing Self to Managing Others

(Authors' own model)

This model can be used firstly for the individual who is transitioning form managing self to managing others. They can identify the challenges they may already be, or will be, experiencing and see where inputs can be received to mitigate these challenges. It is important for the individual to understand that they have a large role in terms of their own inputs towards the management transition. Secondly, the organisation can use this model also to understand what challenges the newly transitioned manager is facing, but also to identify how they can enable and positively influence this transition through clearly identified practices. Further detailed recommendations are discussed below for both individuals and organisations.

7.3 Recommendations for employees becoming first-time managers

The results present the opportunities for recommendations to be made to employees becoming first-time managers. The first recommendation is to instil a sense of agency to pro-actively gain an understanding of the new elements of the

management role. First-time managers can also cultivate a sense of agency for learning which will see them seek out guidance, form relationships with peers and senior management and pursue opportunities for learnings. The second recommendation for individuals is to be open to change and learning which will entail them realising that change is necessary in the transition and that learning will enable them to succeed in the management role. Thirdly, a first-time manager can actively seek input and feedback from others such as their subordinates and line manager. The fourth recommendation for individuals is to embrace the notion of learning through doing and that through mistakes one is able to experience a deepened and enhanced learning.

7.4   Recommendations for organisations in supporting first-time managers

As the results have shown, the organisation can provide inputs to support the transition for individuals moving to their first-time management role. The results have led to three areas of recommendations. The Human Resources departments are recommended to develop and implement practices that promote and enable informal learning within the organisation. Providing structure and the means that encourage collaborative working and open engagements will be advantageous in aiding the much-valued informal learning required for first-time managers. The Human Resources departments are also recommended to provide training to line managers to upskill their ability in coaching. The role of the line manager requires the skill to advise, empower, guide and enable their first-time managers. The last recommendation is that leadership and line managers need to purposefully promote a learning culture that encourages individual learning as well as fostering a sense of trust and security that provides the necessary psychological safety for mistakes to be made.

7.5   Future Research Ideas

The research outcomes have resulted in providing helpful contributions in understanding the influence of inputs in the successful transition to management. The following is suggested for future research:

- The study was conducted in exploring the experiences of newly transitioned managers. The same study can be conducted to determine the opinions and experiences of other stakeholders, namely line mangers of newly transitioned managers and Human Resource departments. The alignment between stakeholder views on the transition can then be ascertained.

- Conduct a quantitative study based on the individual and organisational inputs that influence the success of the transition from managing self to managing others as represented in the results of this study. Predictive variables of what influences the perceived level of success of the transition can be tested to verify the results found in this study.

- The results of this research indicated the value of and need for on-the-job learning which can be achieved through stretch assignments. There literature indicates that stretch assignments can be carefully allocated and assigned for particular leadership development requirements. It is recommended that further research is conducted to explore this leadership development practice in more detail to understand when it is most beneficial and how organisations can best implement such learning practices in the future.

7.6   Research Limitations

The limitations of this research require acknowledgement and should be considered when reviewing the research results and findings. The inexperience of the researcher in conducting research interviews may have influenced the data collection and may have resulted in observer error and interview bias. The sample used in the research may be limiting due to its purposive, homogenous nature and relatively small sample and thus the results cannot be generalised or be considered as a representation of the population. The research interviews were conducted over virtual platforms due to the COVID-19 global pandemic which may have influenced the levels of information shared by research participants, resulting in the possibility of securing insufficient data and/or a decrease in the quality of information shared. Finally, as only the views of people who had recently made the transition were elicited the results may overstate their importance in the factors influencing the transition.

7.7   Conclusion

The purpose of the research was to gain an understanding of the challenges face by first-time managers and the factors that influenced a successful transition from managing self to managing others. The research aim was to make a valuable contribution to the current literature and academic theories.

The outcomes of the research indeed manage to provide insights into the challenges faced. The research could also provide a valuable contribution towards the individual and organisational inputs by unveiling the detailed elements that are required from each stakeholder to influence a successful transition. Lastly, the research was able to determine the critical input required by individuals without which it is detrimental to the transition from managing self to managing others.

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9. APPENDICES

9.1 Appendix 1: Interview Schedule

<table>
<tr><td colspan="4" align="center">INTERVIEW QUESTIONNAIRE</td></tr>
<tr><td>Name:</td><td></td><td>Date:</td><td></td></tr>
<tr><td></td><td></td><td>Start time:</td><td></td></tr>
<tr><td></td><td></td><td>End time:</td><td></td></tr>
</table>

Thank you for meeting with me today and for your commitment to providing input into this research report.

To provide further context on my research, the aim is to gain an understanding of your transition from managing-self to starting to manage others (transitioning to a first-time management role). I'm keen to understand the experience of becoming a manager for the first time.

In understanding the sensitivity in conducting this interview, I would like to reassure you that the interview will be completely confidential, and I encourage you to share freely and openly throughout this engagement.

Considering the interview is being held over digital means, I would like to request your permission to record this meeting which will be used for note-taking purposes only.

Thank you for sending your signed consent form for this interview.

Question 1:

To begin, can you provide some information about your current employment?

Company & Personal details	
Job Title	
Which industry or sector are you working in?	

Question 2:

How long ago did you become a manager for the first time?

Question 3:

Did you move into this role from within the company or were you working at another company before this?

Question 4:

Thinking back to when you first became a manager, can you describe some of the biggest challenges your faced?

Question 5:

What do you think helped you the most in this transition?

I will now be drawing focus to the organisation's role in your transition to management.

THEME: TRAINING AND DEVELOPMENT FOR MANAGERS
Informal training relates to on the job training or development such as observing others, job shadowing, receiving guidance from others (peers, line manager). Formal training relates to facilitated training such as coaching, mentoring, training sessions, short course, conferences, long-term development programmes.
Question 6: Did you receive formal training and development in relation to you becoming a manager? If yes, what formal training was this?
Question 7: Did you receive any informal on-the-job training and development to you becoming a manager? If yes, what informal training did you receive and who from?
Question 8: From the interventions you have mentioned, which ones do you feel helped you the most in your transition to the management role? And in what way?

THEME: SKILL UTILISATION
Question 9: Being a new manager, receiving informal and/or formal training, did you feel you were able to effectively apply these newly learnt skills in your role?
Question 10: Do you feel learning by doing has value and has this been beneficial to you in the transition to management?

THEME: YOUR LINE MANAGERS SUPPORT
Question 11: Thinking back to the first few months of you being in this new management role, what do you feel your manager did well in supporting you?
Question 12: Do you feel your manager could have done anything more to support or help you during this time?

Question 13: Is there anything else you would like to comment on with regards to your line manager in relation to your transition to a management role?

THEME: LEARNING IN THE ORGANISATION
Question 14: When you were appointed into this management role, did you feel that the organisation valued learning? What makes you say that?
Question 15: Did you feel that the organisation valued management development specifically? What has led you to believe this?

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Question 16:

We all tend to make mistakes when we get promoted, thinking to when you first moved into your management role, what happened when you made a mistake?

(Prompt if required: How did your manager react? Were you able to unpack what happened so that you could learn from it? Did you feel your manager / organisation were understanding and supportive)?

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Question 17:

Can you rate each of these items from 1 to 5 indicating the amount of **positive impact** each had in assisting you in your transition to being a new manager, 1 being no impact, 3 being of moderate impact and 5 being substantial impact.

Factors	1 No impact	2 Low impact	3 Moderate impact	4 High impact	5 Substantial impact
Formal training and development					
Informal training and development					
My line manager's support					
Opportunities to put new skills into practice					
Guidance and learning from others outside of the organisation* (if higher than 2 ask who they were)					
My own efforts** (if higher than 2 ask what they did)					

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│ *Guidance and learning from others outside of the       │
│  organisation – if higher than 2:                       │
│ Who assisted you and in what way did this have a         │
│ positive impact?                                        │
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**My own efforts – if higher than 2: What did you do yourself that had a positive impact?

Conclusion

Is there anything else you would like to tell me about your transition to becoming a first-time manager?

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Thank you for giving me your time today. I would like to take a moment to confirm that all the insights and information that you have shared with me today will be kept confidential and no information will be linked to your name.

9.2 Appendix 2: Interview Consent Form

INFORMED CONSENT LETTER

Dear Participant,

I am currently a student at the University of Pretoria's Gordon Institute of Business Science and completing my research in partial fulfilment of an MBA.

To provide further context on my research, the aim is to gain an understanding of the organisation's impact on individual transitions from managing-self to starting to manage others (transitioning to a first-time management role). The research conducted will be focused on the individual's perspective and will require reflection on the organisation's role.

The interview is expected to last about an hour and seeks to gain valuable insights to better understand how organisations can positively support individuals to effectively transition into management roles.

Your participation is voluntary, and you can withdraw at any time without penalty.

Please note that all data that will be used in the research report will be reported and stored without any identifiers. Your confidentiality and the confidentiality of all other participants will be treated as such.

Should you have any concerns, please note that you may either contact the researcher or the research supervisor.

Researcher: Kate Robertson	Research supervisor: Professor Margie Sutherland
Email: robertsonk@gibs.co.za	Email: sutherlandm@gibs.co.za.

Researcher signature:

Research Participant:		Signature:	
Title:		Date:	

9.3   Appendix 3: Non-disclosure agreement

NON-DISCLOSURE AGREEMENT

Dear Transcriber / Editor

I am currently a student at the University of Pretoria's Gordon Institute of Business Science and completing my research in partial fulfilment of an MBA.

Research title: The impact of organisational support on the transition from managing self to managing others

As part of the services offered by you as a transcriber/editor you will be exposed to data gathered through interviews between the researcher and research participants.

All data and information you are exposed to is required to be treated as confidential and it is agreed that you will not disclose any information learned through the transcription or editing process. All data and information is to be disposed of on completion of your services.

Should you have any concerns, please note that you may either contact the researcher or the research supervisor.

Researcher: Kate Robertson	Research supervisor: Professor Margie Sutherland
Email: robertsonk@gibs.co.za	Email: sutherlandm@gibs.co.za

Researcher signature:

Transcriber/Editor:	
Signature:	
Date:	

9.4　Appendix 4: Ethical Clearance Letter

Gordon Institute of Business Science
University of Pretoria

Ethical Clearance Approved

Dear Kate Robertson,

Please be advised that your application for Ethical Clearance has been approved.
You are therefore allowed to continue collecting your data.
We wish you everything of the best for the rest of the project.

Ethical Clearance Form

Kind Regards

This email has been sent from an unmonitored email account. If you have any comments or concerns, please contact the GIBS Research Admin team.