

Envisioning the future and building bridges:

Perspectives of emergent market multinational corporation subsidiary managers

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A journal article submitted to the Gordon Institute of Business Science, University
of Pretoria, in partial fulfillment of the requirements for the degree of
Master of Business Administration

01 December 2020

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.

Bronwen Coleman

A handwritten signature in black ink, appearing to read 'Bronwen Coleman', with a long horizontal flourish extending to the right.

30 November 2020

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1. Cover letter

I selected *Business Horizons* as the journal for the publication of my article. *Business Horizons* is a Scopus indexed journal and according to the Academic Journal Guide has a 2-star rating, in the subject area of 'General & Strategy'. As a practice-orientated journal that is grounded in academics, I saw *Business Horizons* as an appropriate choice. The style of writing sought by *Business Horizons*, which should be readable and non-technical, is well suited to the qualitative phenomenological research I conducted. The manuscript prepared for submission is consistent with the guidelines as stipulated in the 'Guide for Authors' (Elsevier, 2020)

The focus of articles published in *Business Horizons* should be an "emphasis on identifying important business issues, problems, or opportunities and recommending means to address these." (Fisher, 2020, p. 01) My research is focused on an explicit business phenomenon and through interpretation of the findings, I have been able to offer a framework with practical solutions for improvement in practice. Both these attributes are important according to the editor-in-chief for *Business Horizons* (Fisher, 2020). Should *Business Horizons* publish my article, it would allow my research findings in an emergent market context to be accessible to a broad audience of global executives.

2. Chapter 2: Literature review

2.1. Introduction

"Global organizations are inherently complex" (Schotter, Mudambi, Doz, & Gaur, 2017, p. 01). Managers in these dynamic environments often grapple with the issues of balancing opposing perspectives, whilst coping with frequent flux and dealing with unfamiliar situations, all with a high level of ambiguity (Bird & Mendenhall, 2016; Reiche, Bird, Mendenhall, & Osland, 2017; Tippmann, Sharkey Scott, & Parker, 2017). Michailova, Mustafa, & Barner-Rasmussen (2016) observed that recently, multinational corporations (MNCs) have been perceived as less desirable employers, largely because employees in these organisations experience challenges in managing the mutually conflicting responsibilities of corporate headquarters and local stakeholders. Coupled with this, Schotter and Beamish (2011) have previously noted that the scale and complication that exists in the role fulfilled by the individual manager in this MNC context, specifically at the level of intra-organisational conflict management and adaptation which is required, is not sufficiently appreciated.

As identified by Bird and Mendenhall (2016) and Nelson (2018), the just 25-year-old, presently unfolding field of global leadership, where expatriate or domestic managers may be called on to lead anyone, anywhere, at any time as part of global projects or operations, with a heavy emphasis on boundary spanning behaviours, is a phenomenon rich with context that has not been fully explored. To add to this perspective, it has also been noted that the varying contexts of global leadership and comparative studies of traditional leadership theories across opposing cultures are not entirely representative of the differences in leadership effectiveness observed and require further consideration (Bird & Mendenhall, 2016; Oc, 2018; Reiche et al., 2017). This may in part be since the role of culture as a contingency factor on leadership effectiveness and theorising about working and social relationships has been inadvertently over-explored, whilst other contextual factors that influence the ability to lead have not been fully elucidated in the literature (Bird & Mendenhall, 2016; Oc, 2018). Schotter et al. (2017) specifically highlighted that the dynamic and fast-paced emerging markets are particularly underrepresented in the available literature on boundary spanning and global leadership, and there is a gap to contribute to the body of knowledge in these fields.

There exists a need to develop further insights into the boundary spanning role and behaviours of the individual manager as leader in a global context, to better match the characteristics and skill requirements of potential incumbents with the reality of the complexity experienced within and outside the organisation along socio-cultural and geographic lines, amongst others (Reiche et al., 2017; Schotter et al., 2017). According to Michailova et al. (2016), there have been repeated calls for microlevel analysis of subsidiary phenomena in an MNC context. Whilst, Reiche et al. (2017) recommended that the extent to which managers can influence different followers given the unique contextual demands of task and relationship they face in their roles as boundary spanners in MNCs is an area ripe for further exploration.

These current and relevant considerations, together with a rapidly changing and attractive emerging markets landscape, converge to present a gap in the literature that needs to be addressed (Bird & Mendenhall, 2016; Michailova et al., 2016; Nelson, 2018; Oc, 2018; Reiche et al., 2017; Schotter et al., 2017). This research will contribute theoretically to the body of knowledge about boundary spanning and global leadership, in the specific context of MNC subsidiaries operating in emerging markets. The aim of this research is to explore the extent to which the contextual

demands of task and relationship experienced by domestic managers fulfilling boundary spanning roles, influence their leadership effectiveness.

2.2. Multinational corporations landscape

Multinational corporations particularly encounter challenges in identifying, appointing and maintaining the organisational commitment and retention of their subsidiary managers (Michailova et al., 2016). Individuals in these roles often find that they are overwhelmed with concurrent conflicting responsibilities towards corporate headquarters, peers, suppliers, customers and even with the country they are operating in and this may lead to immense personal distress, and even poor organisational outcomes (Michailova et al., 2016). The global dimension plays an important role in the MNC and executives in these positions find that they need to pay careful attention to their own finite capacity to give equal attentiveness to all required business interventions (Birkinshaw, Ambos, & Bouquet, 2017).

Schotter and Beamish (2011) highlighted that the increasing complexity of intra-organisational demands is a generally accepted point of conflict between MNC headquarters and their foreign subsidiaries. Added to this perspective, Worley and Mohrman (2014) observed that managers are bombarded with global changes which are complex, move fast, occur simultaneously and intersect with technology, and their ability to stay abreast has not kept pace with the environment they find themselves situated in. Thus, there coexists with intra-organisational complexity, a global business landscape which itself offers a rising rate of complexity, associated with increased volatility, uncertainty and interconnectedness that remains one of the biggest challenges facing all organisational leaders in the world today (Uhl-Bien & Arena, 2017).

The speed at which complexity is increasing may overwhelm many traditional managers attempting to use foundational management practices that prove not to be sufficiently adaptable for the fast-changing and chaotic, market-driven environments they wish to control (Uhl-Bien & Arena, 2017). The healthcare arena is no exception, with complexity in this sector ramping up and increasing levels of uncertainty as to where things will end (Uhl-Bien & Arena, 2017). Technology, volatile regulatory environments and dynamic patient relationships, including pay structures, are just some of the more specific challenges executives in this landscape are grappling to come to terms with, in addition to the more general business phenomena (Uhl-Bien & Arena, 2017).

Importantly, Bird and Mendenhall (2016) pointed out that Hofstede's (1984) *Culture's Consequences* publication may have inadvertently resulted in an overemphasis on culture as the most relevant contextual variable in effective global leadership, and that other contingencies in multinational management practices have not been sufficiently explored in this field. A similar observation about the ongoing emphasis on the context of culture, in the field of leadership studies, was made by Oc (2018). According to Oc (2018), omnibus (i.e. national cultures, institutions or markets, organisations) and discrete (i.e. task, social, physical, temporal) contextual factors all influence the practice of leadership and its resultant outcomes and should be more deeply considered in future leadership studies. A view, which was further explored in the global leadership typology work of Reiche et al. (2017), that forms a foundational pillar of this research proposal.

When considering the contextual factors which influence the practice of leadership in MNCs, it is of interest to note that Dickson, Castaño, Magomaeva, and Den Hartog (2012) observed that much of the theoretical work to date, looking primarily through the lens of new-age leadership theories (i.e. charismatic and transformational leadership), has not considered the effect of other contingent factors. The authors went on to reflect that many of the advantageous traits observed in these leadership styles are simply inherent and similar across many cultures, and not necessarily indicative of actual leadership effectiveness (Dickson et al., 2012).

Reiche et al. (2017) and Schotter et al. (2017) expounded on this position and identified a theoretical gap in the literature on the specifics of the boundary spanning behaviours of the individual as a manager or leader, in a global context. Whilst simultaneously, Schotter et al. (2017) emphasised the lack of information pertaining to emerging markets in these contexts. These views were all supported by Reiche et al. (2017) and Nelson (2018) that respectively highlighted that insufficient attention had been given to the contextual demands of global roles in MNCs, as related to task and relationship complexities faced by the individual as a manager in a boundary spanning role. Finally, adding to all these perspectives, Uhl-Bien and Arena (2017) also brought to the foreground the relevance of complexity in the healthcare sector and how the chosen management approach may, in fact, lead to the success or failure of an organisation.

The combination of these recent findings highlight not only a theoretical need for further research but also an urgency for business to understand the implications on

individuals appointed to these challenging roles in emerging market subsidiaries of MNCs. By illuminating the reality of the complexity experienced by employees in boundary spanning leadership roles and grasping the unique contextual environment they face within and outside the organisation, MNC employers may be able to better match the characteristics and skill requirements of potential incumbents to these roles. In so doing, there exists the potential to reduce the risk of failure and attrition which are inherent in these challenging placements (Reiche et al., 2017). As aptly pointed out by Nelson (2018), ultimately it will be the lack of necessary global leadership skills that are likely to continue to threaten corporate performance and business growth into the future, and these need to be better understood to change outcomes favourably for subsidiaries of MNCs in high growth potential emergent markets.

Thus, there exists a dual requirement. To explore the contextual environment of task and relationship as related to fulfilling the simultaneous roles of global boundary spanner and domestic manager, to gain deeper insights into the complexity experienced by the individual in this position (Reiche et al., 2017). Also, to determine whether the impact of these demands on a personal level can influence an individual's ability to lead an organisation effectively (Reiche et al., 2017).

The purpose of this research is to better understand the influences of task and relationship complexity on the effective leadership of boundary spanning managers, in a global business context. To delve deeper into the theoretical context of these constructs current literature will be reflected on. Firstly, at a macrolevel, the influence of organisational structure on leadership effectiveness will be considered. Secondly, at a mesolevel of analysis consideration will be given to developments in the fields of global leadership and boundary spanning to date. Thirdly, the relevant contingent considerations of task and relationship complexity will be elucidated at the microlevel of the lived experiences and perceptions of the individual domestic manager, operating as a boundary spanner leader in a global context.

2.3. Organisational structure

Decisions relating to the organisational structure within MNCs create the overarching omnibus contextual environment in which individuals are expected to operate as managers or leaders of local subsidiaries (Oc, 2018). According to Cummings and Worley (2015a), "Organization structure describes how the overall work of the organization is divided into subunits and how these subunits are coordinated for task

completion” (p. 339). A more recent and academic contingency perspective framework (**Figure 1**) will be used as a basis for considering the impact of organisational structure on individual leadership effectiveness (Cummings & Worley, 2015a). According to this theory, organisational structures should be designed to fit at least four relevant factors (i.e. environment, organisation size, organisation strategy and technology) and organisational effectiveness is dependent on the structure being responsive to all these considerations (Cummings & Worley, 2015a).

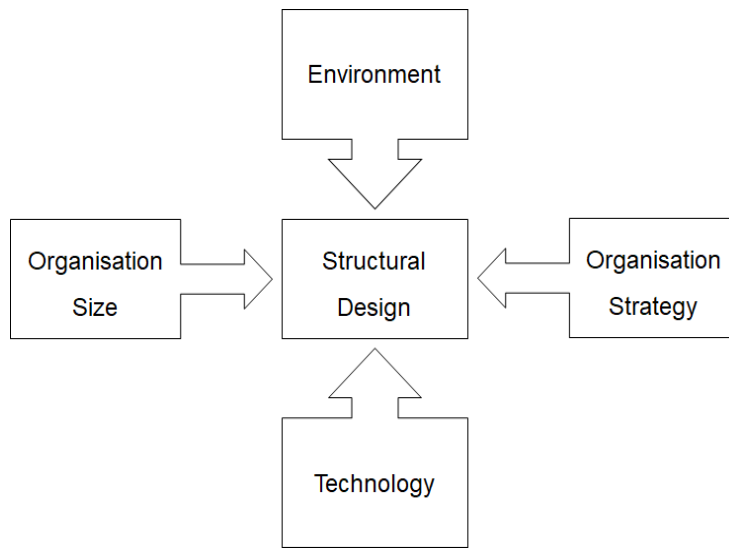


Figure 1: Contingencies influencing structural choices. Source: Cummings, T., & Worley, C. G. (2015a). Chapter 12, *Restructuring Organizations*. In *Organizational Development and Change* (pp. 339-374). San Francisco: Cengage Learning. Organisational design.

Johns (2006) found that organisational characteristics provide the context for its individual members and may serve more than just to simply interact with personal variables but could in fact cause a primary effect. Yet, only more recently has the effect of context and situational factors, in general, on leadership behaviour and outcomes been attended to in the literature (Porter & McLaughlin, 2006). Most critically for this research, Porter and McLaughlin (2006) point out that leadership action can be influenced by or exert influence on organisational context.

However, the contingency perspective on structural choice and the ambivalence of current best practice in organisational design towards the group or individual level of operations is apparent in its absence (Cummings & Worley, 2015a). This is a sentiment which was also raised by Porter and McLaughlin’s (2006) observation that at the individual level of analysis, organisations and their inherent structures have

not historically been given sufficient attention as relevant contexts affecting the behaviour that occurs in them.

Furthermore, according to Lord, Day, Zaccaro, Avolio, and Eagly (2017) the individual as leader may no longer be at the center of considerations around leadership in organisations, where the focus is shifting more towards relationships in increasingly decentralised social systems from which independent social conventions, group structures and objectives are emerging spontaneously.

In practice, the leadership effectiveness of a domestic manager that is expected to fulfil the dual roles of a boundary spanning global team member, as well as a leader in a local context may inadvertently be influenced by the chosen, more static non-responsive, structural design imposed by the organisation, whilst actually operating in a more spontaneously emerging work landscape. All of which has the potential to affect the incumbent personally and impact leadership effectiveness, and ultimately organisational performance.

2.3.1. Components of organisational context

Porter and McLaughlin (2006) go on to provide a comprehensive list of examples of elements of components of organisational context (**Table 1**). These components and elements can be related back to the organisation structural design, which may independently inform and impact each of these in a unique way. Of relevance to this research will be examples of elements that tie in with the constructs of task and relationship complexity, which are being explored as facets that have an influence on the individual leadership effectiveness of managers that fulfil boundary spanning roles within a global context.

A premise is that the components of organisational context, 'Processes' and 'Structure' are considered most likely to have an influence on the task complexity of the roles fulfilled by the local manager, as they relate directly to how an incumbent would be enabled to fulfil a specific function. It is speculated that all the major components of organisational context cited have the potential to directly impact on the relationships the local manager can maintain, as they dictate the normative environment under which the individual engages with corporate headquarters, peers, suppliers, customers and even within the broader industry and markets they operate in.

Table 1: Major components of organisational context: examples of element components (Porter & McLaughlin, 2006).

Component	Examples of elements
Culture/climate	<ul style="list-style-type: none"> ● Types of culture (e.g. bureaucratic, adaptive) ● Norms that reflect the culture ● Cultural emphasis on ethics
Goals/purposes	<ul style="list-style-type: none"> ● Goals, strategies, and missions of individuals, groups and organisational units
People/composition	<ul style="list-style-type: none"> ● Demographic variability within the organisation ● Capabilities of individuals and groups
Processes	<ul style="list-style-type: none"> ● Type(s) of technologies in use ● Task factors (e.g. differentiation, complexity, ambiguity) ● Mode of governance ● Degree of standardisation of processes within the organisation ● Policies (e.g. HRM policies)
State/condition	<ul style="list-style-type: none"> ● Stability or crisis ● Availability of resources ● Organisational health (e.g. financial, reputational)
Structure	<ul style="list-style-type: none"> ● Size, shape, and type of organisation ● Degree of formalisation and centralisation ● Hierarchical levels of individuals and groups under consideration ● Spatial distances between individuals/groups
Time	<ul style="list-style-type: none"> ● Duration of leadership effects ● Organisational life cycle stage effects ● CEO/TMT succession history

Source: Porter, L. W., & McLaughlin, G. B. (2006). Leadership and the organizational context: like the weather? *The Leadership Quarterly*, 17(6), 559-576.

2.3.1.1. Culture/climate

Organisational culture not only describes the environment in which people work, but also how they think, act and experience that work (Warrick, 2017). According to Warrick (2017), effective leadership can be influenced by decisions which do not carefully consider the cultural impact they have.

2.3.1.2. Goals/purpose

Porter and McLaughlin (2006) noted that goals and purposes as an organisational context component and at the individual level of analysis, in relation to effective leadership has not been given much attention in empirical research. This is interesting to note as leadership is considered a cornerstone to the purpose of achieving a common goal (Oc, 2018).

2.3.1.3. People/composition

Whilst heterogeneity in organisations has been found to lead to increased creativity and innovation (Mumford, Marks, Connelly, Zaccaro, & Reiter-Palmon, 2000), MNCs face unique challenges in staffing subsidiaries with a mix of parent country nationals, host country nationals and third-country nationals that may experience conflicting allegiances (Michailova et al., 2016). Such allegiance patterns may in turn underpin MNC staffing strategies and at an individual level, employee capabilities to interact effectively (Michailova et al., 2016).

2.3.1.4. Processes

According to Andersson, Dasí, Mudambi, and Pedersen (2016), it is the intangible ideas owned by international businesses which are often most central to their value propositions and ownership of these often explain the existence of MNCs. This concept is supported by Tippman et al. (2017) who highlight the critical nature of knowledge transformation across country units in MNCs. Thus, MNCs rely heavily on connectivity between individual actors to ensure that individual-based personal relationships, as well as organisation-based pipelines, can be maintained within and across different locations to maintain such important intellectual property (Andersson et al., 2016).

2.3.1.5. State/condition

Several empirical and conceptual articles have highlighted the importance of the state of the organisation on the manifestation of leadership effectiveness (Porter & McLaughlin, 2006). Under different conditions of operation, namely being in a state of crisis versus stability or being under- or over-resourced, different types of leadership styles emerge and may be more or less effective in response to the peculiar circumstances encountered (Porter & McLaughlin, 2006).

2.3.1.6. Structure

Recently, Lord et al. (2017) noted that transformative changes that were taking place in organisations would necessitate not only reimagining of how to structure the way people work and act, but also adaptation of leadership models in response to these dynamic organisational shifts. This is reflected in practice, where it is not clear at all whether the impact of organisational structure on an individual's ability to optimally function and effectively lead is considered in any depth.

2.3.1.7. Time

Time may have an impact on leadership effectiveness as new managers must first acquire base ideas, learn what is expected of them and then apply these concepts in specific settings (Mumford et al., 2000). To develop further expertise increasingly complex scenarios for independent problem-solving and application of concepts are needed, together with learning to rapidly integrate information from multiple sources (Mumford et al., 2000). Thus, it appears that effective leaders require time to develop the necessary capabilities and high turnover at a management level may decrease the effectiveness of leadership in organisations.

This research aims to elucidate the organisational design structures of the foreign subsidiaries of MNCs in the pharmaceutical and medical device healthcare sector and ascertain whether any of the major components of organisational context exert any broader influence on the leadership effectiveness of the domestic manager. Porter and McLaughlin's (2006) major components of organisational context will be utilised to categorise and analyse participant feedback on organisational structure and design.

2.4. Global leadership

2.4.1. Leadership and the relevance of context

Leadership can be defined as “an influencing process – along with its resultant outcomes – that takes place between leaders and followers to achieve a common or shared goal” (Oc, 2018, p. 220). Importantly Oc (2018) draws attention to the fact that the context in which the influencing process of leadership occurs appears to be one of the major defining factors of leadership and that considerations relating to leaders cannot take place in a vacuum. However, researchers have pointed out that with an increased focus on the development of new-age leadership theories (i.e. transformational and charismatic leadership), consideration of the contextual factors

in conceptual and empirical articles on leadership has waned (Oc, 2018; Porter, & McLaughlin, 2006).

In harmony with Oc's (2018) definition of leadership, through the lens of Reiche et al. (2017), global leadership is described as a process and the actions an individual employ to influence a broad group of internal and external parties across many national cultures and jurisdictions. Reiche et al. (2017) go on to astutely point out that there is currently no agreed-upon conceptualisation of the multiple facets of global leadership and meaningful conclusions cannot yet be drawn, asserting that the field will remain fragmented and immature until these are further explored. This perspective warrants the current proposed phenomenological research into the lived experiences of the individual manager, which will build on the context of task and relationship complexity of the boundary spanning leader operating in a global context.

2.4.2. The changing nature of teams

Flatter work structures and complex cross-functional tasks have become the norm in the modern organisation (Liu, Jiang, Chen, Pan, & Lin, 2018), whilst teams are establishing themselves as a common form of work organisation that are typically expected to manage challenging projects in constrained timeframes (Maruping, Venkatesh, Thatcher, & Patel, 2015). The very nature of the value-creating attributes of teamwork dictates the expectation that multiple tasks can be executed simultaneously, sequentially or reciprocally and within extraordinarily tight deadlines (Maruping et al., 2015). In line with this thinking, it is apparent that global teams, located across time and space, are becoming normative practices in modern organisations and individuals are expected to work or manage over many unknown and often changing boundaries without sufficient guidance on how to do so (Butler, Minbaeva, Mäkelä, Maloney, Nardon, Paunova, and Zimmermann, 2018; Liu et al., 2018).

These types of modern working arrangements bring with them not only the expectations associated with regular teams of high-demand, high-functioning environments but also the complexity of a global landscape and division across socio-cultural, geographic and spatial-temporal lines which are inextricably linked despite all the unknowns that exist between them. It is not yet clear what effective leadership practices might look like in these new complex global team working arrangements and whether the trade-offs that need to be managed in these situations

result in improved business outcomes and organisational performance (Butler et al., 2018).

2.4.3. Mutually conflicting responsibilities

As most domestic MNC subsidiary managers not only have critical local managerial and leadership functions to fulfil but in addition, global requirements and expectations related to boundary spanning activities that need to be met, which often entail mutually conflicting responsibilities toward a myriad of stakeholders or paradox, there may be an associated personal impact experienced by the individual that inhibits the ability to effectively lead (Michailova et al., 2016; Nelson, 2018). The personal distress that may arise due to multiple allegiances and attempting to be loyal to all parties could negatively impact organisational outcomes (Michailova et al., 2016). It is the effect on the leadership effectiveness of a manager in a boundary spanning role which needs to be further explored in this research, to determine whether such individuals are equipped to effectively influence followers at a domestic level to achieve organisational success.

Chiu, Balkundi, and Weinberg (2017) elude to the fact that prototypical essential leadership qualities (i.e. charisma, dynamism, dedication, intelligence, extroversion, position in a social network, etc.) are more subjective in nature and that to develop a positive leader-follower dynamic, increased face-to-face time between individual is of the essence. Through frequent engagements with their staff, managers can demonstrate the traits considered to be associated with leadership (Chiu et al., 2017). The first-hand experience of a manager's expertise and overall competence lead to favourable views of a manager and social inclusion by the group. This is typically an iterative process, whereby as followers feel increasingly comfortable and confident to approach a manager for task-related support and the manager can demonstrate ongoing value to the group, the manager is increasingly regarded as a leader. In instances where a manager is unable to develop the necessary leadership traits, from the perspective of the demarcated followers, the likelihood of goal attainment is substantially diminished, and personal performance measures will become affected negatively. Ultimately causing poor performance outcomes for the group and the manager, thus undermining the overall organisational objectives (Chiu et al., 2017).

Specifically, for managers operating as team members in a complex global environment whilst simultaneously fulfilling a local managerial role, decreased staff

interactions and face-to-face time may inadvertently lead to unintended negative associations and social exclusions, including avoidance of the manager and a notable reluctance to request support on critical tasks. Detrimental outcomes are then increasingly likely to occur and in the eyes of the followers, these are then attributed to a failure of leadership, which may result in disrespect toward and devaluing of the manager by the subsidiary organisation (Chiu et al., 2017).

The task and relationship complexity of the dual roles fulfilled by the manager may contribute not only to manager availability to demonstrate the necessary leadership traits but also influence perceived inability to effectively lead the local organisation. Paradoxically, this may in turn be exacerbated by the fact that group cannot observe the effective boundary spanning activities the manager is in fact engaged in (Yukl, 2012).

2.4.4. Complexity in global working arrangements

Uhl-Bien and Arena (2017) differentiate complexity from complication, asserting that when there is a deep level of interaction between things they change one another in an unanticipated and lasting manner, and that they cannot be broken down to their original parts, remaining irrevocably linked as a 'system'. Complex global team working arrangements are representative of such systems within subsidiaries. With ever-evolving business practices developing in this direction it should be further explored. The impact of multiple global team-memberships on the ability to manage or lead at an individual level, in a domestic context, can be ascertained.

Many domestic managers have dual responsibilities, including leadership of local operations and global team participation or leadership. Although typical to this role, the vital leadership behaviours of boundary spanning and ability to influence bosses, peers, and outsiders as well as subordinates, are skills that very few employees have the opportunity to observe their manager's exhibiting when interacting with people outside their work unit (Yukl, 2012). Furthermore, unfortunately, according to Liu et al. (2018) boundary spanning roles have been noted to have undesirable effects on individual manager performance related to increased role overload, stress, conflict and ambiguity, all of which may potentially impact task performance.

Thus, employees which may even realise favourable benefits from the successful management of these often-conflicting responsibilities, ironically never become aware of the manager's expertise in this environment and could in fact perceive their

performance in a local context as poor. This factor becomes relevant when you consider that Chiu et al. (2017) made the point that individual or group level perception of a leader matters because it influences performance measures such as organisational commitment, compliance to requests and overall job satisfaction of staff. In addition, of potential benefit to the manager, is that individuals who are identified as leaders tend to form better relationships with employees, receive superior performance reviews and have increased access to critical resources, all of which improve their personal performance as a manager and contribute to overall organisational success (Chiu et al., 2017).

At this junction, with many domestic managers fulfilling evolving roles in a global context, and the phenomenon of informal leader emergence occurring more frequently in modern working arrangements, it remains to be seen whether boundary spanning behaviours can in fact contribute to performance in organisations (Liu et al., 2018). These conflicting perspectives all tie in with the observations made by Reiche et al. (2017), that task and relationship complexity experienced by a manager fulfilling a boundary spanning role in a global team may impact the individual on a personal level and determine ability to lead an organisation in a domestic context.

The lack of insights into whether boundary spanning behaviours can positively affect leadership and reputation as perceived within the team is not clear, it is apparent that deeper insights are required to investigate the complexity that exists in these boundary spanning leadership roles.

2.5. Behaviours exhibited by boundary spanning managers

2.5.1. Organisational boundaries

Boundaries exist within and between organisational structures to delineate the bounded limits of the system and to fortify it from external, environmental disruptions, whilst ensuring inputs and outputs of the internal processes can enter and exit as required (Cummings & Worley, 2015a). Such boundaries may vary in permeability and are defined by facets such as physical location, but also purposes related to managerial, technical or social parameters (Cummings & Worley, 2015b). Despite their inherent purposes, it remains relevant to assess the relevance of these boundaries on an ongoing basis and whether they remain appropriate for achieving the desired organisational outcomes (Cummings & Worley, 2015b).

2.5.2. The role of a boundary spanner

In the seminal work of Leifer and Delbecq (1978), the role of a boundary spanner was described as an individual operating on the periphery of an organisation, business or unit to bring relevant information required for conducting 'work' into the internal environment. More recently Birkinshaw et al. (2017) validated the relevance of this information sharing perspective, asserting that seeking opportunities to mediate the flow of information remains a key part of the definition of the entrepreneurial or value-adding role played by individuals in a boundary spanning capacity. According to Zhang, Wu, and Henke (2015), the role of a boundary spanner in an organisation is two-fold, internal processing and external representation. Whilst a more encompassing definition by Nelson (2018) describes boundary spanning as consisting of the creation and navigation of linkages and networks across economic, functional, geographic, cultural, linguistic, religious, educational, political, and legal systems.

Schotter and Beamish (2011) noted that the observed boundary spanning abilities to broker and influence higher levels of organisational effectiveness arise from the personal capabilities and traits of an individual. Furthermore, Schotter and Beamish (2011) also observed that the challenges in MNCs offered a level of complexity not necessarily experienced in other organisations and the perspective that boundary spanners in this context simply existed to effectively manage inevitable headquarter-subsidary conflict through increased linkage economies was an oversimplification and outdated view of the role fulfilled by the prototypical manager operating in a global environment. These individuals needed to demonstrate the ability to overcome different world views and institutional contexts of two parties on either side of a boundary (Birkinshaw et al., 2017).

It is believed that to understand perception gaps and reduce tension, boundary spanners also require critical organisational knowledge and personal power in the areas of information power, referent power, and informal legitimate power (Schotter & Beamish, 2011). This power seems to be the necessary ingredient to mobilise support across internal and external boundaries (Birkinshaw et al., 2017). Yukl (2012) and Liu et al. (2018) have respectively highlighted that insufficient research attention had been given to boundary spanning behaviour at an individual level and that few leadership studies have examined external, boundary spanning behaviours. Whilst, an opposing perspective offered by Reiche et al. (2017) is that 'boundary

spanning activities' is now considered to contribute critically to the field of global leadership and have been extensively researched to gain a deeper understanding of the nature of everyday tasks in which global leaders engage.

Thus, it is clear that the behaviours embodied by boundary spanners can no longer be considered simply as tasks or activities that take place on the periphery of organisations but should rather be explored in terms of the bearing they have on the competence of a manager, as an individual with the ability to influence others and ultimately business outcomes. To understand the role of boundary spanning behaviours in a leadership role, the context within which they take place need to be further explored and documented.

2.5.3. Boundary spanning in a leadership role

Boundary spanning leadership has been defined as “the capacity to create direction alignment, and commitments across group boundaries in service of a higher vision or goal” (Ernst & Chrobot-Mason, 2010, p. xxii). Thus, the field of boundary spanning, nested in the context of global leadership, offers a suitable lens to consider the unique complications experienced by boundary spanning leaders (Andersson et al., 2016).

According to Schotter and Beamish (2011), boundary spanners are naturally driven by high levels of intrinsic motivation and are generally of the view that the boundary spanning task is the most important part of their responsibility. This brings into focus the dichotomy of the expectations on a domestic manager who is expected to lead locally but also to effectively maintain multiple global tasks and relationships. Begging the question, which objective an individual would choose to prioritise in this role? It is in this consideration that one fully grasps the need for further investigation of the specific context experienced by managers fulfilling these straddled subsidiary manager positions and the challenges they experience in aligning objectives and decision making.

Reiche et al. (2017) expand on the construct of boundary spanning leadership, asserting that “context determines the boundary conditions and hence the suitability of specific behaviors and activities through which a leader can achieve external influence” (p. 07). Reiche et al. (2017) go on to note that, without contextualisation, to date qualitatively different leadership roles have very often been compared under one umbrella, while the requirements are worlds apart. Importantly, both Reiche et

al. (2017) and Oc (2018) draw attention to the fact that leader-follow relationships and leaders themselves do not exist in a vacuum. The point made is that context matters and is a key contingency factor that differentiates roles qualitatively. Context can determine a manager's chances of success or failure in a particular position (Oc, 2018; Reiche et al., 2017).

Further to this, Litano, Major, Landers, Streets and Bass (2016) stress the personal impact that a demanding job, where high performance is critical, can have on an individual's mental and/or physical well-being. A slow progression to exhaustion is common when employees are confronted with inadequate resources and high job demands (Litano et al., 2016). In this context psychological well-being is reduced and 'weaker task and contextual performance' become apparent (Litano et al., 2016). This research aims to provide deeper insights into whether the discrete contextual factors of task and relationship complexity influence an individual manager on a personal level to the extent that it makes it challenging for them to demonstrate what is perceived as effective leadership in a domestic context.

2.6. Discrete contextual factors under consideration

2.6.1. Contextual embeddedness

Reiche et al. (2017) guide thinking on the field global leadership as a discipline by giving the fresh perspective that now more than ever, technically-skilled or effective managers are being placed in leadership positions that engage across diverse boundaries without being equipped to do so. The authors suggest that given the 'contextual embeddedness' in which leadership increasingly occurs, the contingency factors of task and relationship complexity at an individual unit of analysis, typically associated with leadership effectiveness in traditional and business literature, warrant further examination in a global context where they are often high (Reiche et al., 2017; Yukl, 2012). In exploring this area, the opportunity exists to contribute meaningfully to the concept of 'boundary spanning global leader' and highlight challenges that arise from this new world of work in which individuals find themselves embedded.

2.6.2. Typology of global leadership roles

Reiche et al. (2017) proposed a typology for four ideal-typical global leadership roles (**Figure 2**), each delineating a perspective on the related demands with regards to 'task complexity – characterising the variety and flux within the task context and

relationship complexity – reflecting the boundaries and interdependencies within the relationship context’. This typology will form the basis of the exploration around the boundary spanning roles fulfilled by the manager as a global team member and the impact of these on the individual at a personal level, and the ability to lead an organisation towards the desired business outcomes in a domestic context (Reiche et al., 2017).

Relationship Complexity	High	<p style="text-align: center;">CONNECTIVE Global Leadership</p> <ul style="list-style-type: none"> • Task: Low levels of variety and flux • Relationship: High number & variation of boundaries and high levels of interdependence <p>Example role:</p> <ul style="list-style-type: none"> • Leader of globally distributed team that handles firm’s back office <p>Example role behaviours:</p> <ul style="list-style-type: none"> • Learn nuances of distinct interaction contexts • Continuously adapt and respond to different exchange partners’ behaviours (code-switching) • Build interaction frequency and intensity through virtual communications and frequent travel • Leverage social frictions for problem solving 	<p style="text-align: center;">INTEGRATIVE Global Leadership</p> <ul style="list-style-type: none"> • Task: High levels of variety and flux • Relationship: High number & variation of boundaries and high levels of interdependence <p>Example role:</p> <ul style="list-style-type: none"> • Senior executive of global multi-unit firm <p>Example role behaviours:</p> <ul style="list-style-type: none"> • Recognise and handle trade-offs and paradoxes across both task and relationship domains • Develop synergistic solutions • Engage in regular coordination and integration activities across tasks and constituent groups • Contextualise change implementation processes • Engage in distributive leadership processes
	Low	<p style="text-align: center;">INCREMENTAL Global Leadership</p> <ul style="list-style-type: none"> • Task: Low levels of variety and flux • Relationship: Low number & variation of boundaries and low levels of interdependence <p>Example role:</p> <ul style="list-style-type: none"> • Export director in firm that operates internationally through licensing <p>Example role behaviours:</p> <ul style="list-style-type: none"> • Lead incremental change efforts • Focus on technical innovation • Create visions that are narrow in scope • Use routinised and standardised forms of communication 	<p style="text-align: center;">OPERATIONAL Global Leadership</p> <ul style="list-style-type: none"> • Task: High levels of variety and flux • Relationship: Low number & variation of boundaries and low levels of interdependence <p>Example role:</p> <ul style="list-style-type: none"> • Leader of product development in firm that provided financial services to global customers <p>Example role behaviours:</p> <ul style="list-style-type: none"> • Locally adapt task prioritisation, allocation of resources, problem solving processes • Scan, process, attend to and continuously analyse disparate operational information • Lead varying operational changes at local levels
		Low	High
		Task Complexity	

Figure 2: A typology of global leadership roles. Source: Reiche, B. S., Bird, A., Mendenhall, M. E., & Osland, J. S. (2017). Contextualizing leadership: A typology of global leadership roles. *Journal of International Business Studies*, 48(5), 552-572.

2.6.2.1. Incremental global leadership role

With low levels of task and relationship complexity, this uncomplicated global role is typified as being more predictable and transparent, while reaching across a few national cultures and jurisdictions (Reiche et al., 2017). Of a more technical nature, with a high degree of specialisation, there exists a limited scope of necessary engagements to fulfil the relatively straightforward task requirements (Reiche et al., 2017).

2.6.2.2. Operational global leadership role

Reiche et al. (2017) describe this as one that typically entails a high level of task complexity but low levels of relationship complexity. Although it may be characterised by a cognitively demanding environment to ensure effective task execution, it is supported with well-established systems and processes that experience low levels of flux and require minimal relational effort (Reiche et al., 2017).

2.6.2.3. Connective global leadership role

As a connective global leader, an individual in this role will typically experience the highest complexity and flux in the social domain (Reiche et al., 2017). Outside of multiple physical boundaries, this role will also expose incumbents to identity-based boundaries where they encounter others who are culturally, linguistically, functionally and institutionally diverse (Reiche et al., 2017). However, as relates to task complexity there is a low level of environmental variety and tasks are focused and stable (Reiche et al., 2017).

2.6.2.4. Integrative global leadership role

This role is assumed to be demanding on both a task complexity and relationship complexity front (Reiche et al., 2017). With intense requirements on the individual to respond to many variables and changing task environments, relationships that are maintained across a broad and scattered group of individuals add to the complication managed at this level (Reiche et al., 2017).

2.6.3. Taxonomy of leadership behaviours

To improve interpretation of Reiche et al.'s (2017) typology of global leadership, Yukl's (2012) proposed taxonomy to describe leadership behaviours will be used to categorise feedback on task-orientated and relationship-orientated behaviours. According to Yukl (2012), unique specific leadership behaviours exhibited in the context of tasks are orientated toward accomplishing work in efficient and reliable ways. Whilst the primary goals of relations-orientated leadership behaviours have as their core objective the need to increase the quality of human resources and relations, or human capital in an organisation (Yukl, 2012). The leadership behaviours in Yukl's (2012) task-orientated objectives include (1) Clarifying, (2) Planning, (3) Monitoring operations and (4) Problem solving, whilst those typically utilized by leaders in relations-orientated goals are (1) Supporting, (2) Developing, (3) Recognising and (4) Empowering.

These broad constructs, as proposed by Yukl (2012), will be used to facilitate the integration of the research findings relating to the effects of the self-described task-orientated and relationship-orientated leader behaviour of the manager on their team and organisational performance. An attempt will be made to categorise the role of a domestic subsidiary manager according to Reiche's (2017) typology. The impact of organisational structural design, and associated task and relationship complexity, will be documented in order to better understand the context of the role fulfilled by this type of boundary spanning global leader.

2.7. Research questions

The purpose of this qualitative study was to explore the extent to which the international MNC organisational structure, and the associated demands of task and relationship complexity which accompany the specific organisational design components, impact the individual as a manager in a boundary spanning role on a personal level and consequently influence the ability to effectively lead a local organisation.

Research question 1

How does organisational structural design influence the demands of task and relationship complexity experienced by managers in boundary spanning leadership roles?

Research question 2

How do the demands of task and relationship complexity impact managers in boundary spanning leadership roles and influence their ability to lead effectively in a domestic context?

Research question 3

What are the lived experiences of managers in boundary spanning roles and how do they impact effective leadership practices in their organisations?

3. Chapter 4: Research design and methodology

As pointed out by Reiche et al. (2017), it is the unique contextual demands of task and relationship complexity that managers fulfilling boundary spanning roles in global teams' face, which require further exploration. Whilst, Schotter et al. (2017) specifically highlighted that the dynamic and fast-paced emerging markets are

particularly underrepresented in the available literature on boundary spanning and global leadership, and there is a gap to contribute to the body of knowledge in these fields.

Due to the heavy emphasis on the implications of context in global leadership, the researcher believed that this under-researched area of boundary spanning leadership in an emergent market firstly required an intensive perspective on the way individuals operating in these spaces construed their world (McCracken, 1988).

According to Hammarberg, Kirkman, and de Lacey (2016), qualitative methods are best suited to answering questions which do not lend themselves to data which count or measure phenomena. The purpose of this research was to gain new insights into the complications, logic and character that make up this unfamiliar business landscape (McCracken, 1988). Thus, the questions which needed to be answered in this research required data which spoke to the experience, meaning and perspectives of the individual participants and were well suited to a qualitative approach (Hammarberg et al., 2016).

Finally, as it was the unique contextual environment of boundary spanning roles in global teams which have been highlighted as under-researched in recent theoretical and empirical studies, it was determined that an in-depth qualitative design and interpretive analysis would be most suited to explore the minds and lives of participants to best capture the essence of their lived experiences.

3.1. Population

The population included all senior managers at an executive level in the pharmaceutical and medical device healthcare sector that regularly engage in boundary spanning activities in a global context and manage a team in a domestic or global context.

3.2. Unit of analysis

According to Kumar (2018), the unit of analysis forms an important part of the chosen research methodology, determining the 'what' and 'who' is being studied (Kumar, 2018). Kumar (2018) identified four different units of analysis in social science research: individuals, groups, organisations and social artefacts. Schotter et al. (2017) noted that "individuals are the nested antecedent to organizational level actions and therefore deserve careful theoretical and empirical deliberation" (p. 01). Hammarberg et al. (2016) observed that to be able to gather data to answer

questions that have social meaning researchers need to capture people's real-life experiences, which may differ substantially from one person to the next. Thus, to bring new perspectives to the existing body of work, the unit of analysis chosen for this research was the lived experiences of the individual senior managers at an executive level.

3.3. Sampling method and size

A non-probability, purposive or judgmental sampling method was employed, making use of quota and snowball sampling to select appropriate participants that fulfilled similar roles (Palinkas, Horwitz, Green, Wisdom, Duan, & Hoagwood, 2015).

Tracy (2010) stated that validity is concerned with whether a study appears to be reasonable and appropriate. In qualitative research, this can be achieved through rich rigour (Tracy, 2010). This requisite rigour can be achieved not only through sufficient application of theoretical constructs, data sources and contexts but also by the sampling choices made (Tracy, 2010). To support the necessary rigour required in qualitative research, Tracy (2010) highlighted the importance of the selection of the correct sample and context to achieve the given goals.

In service of this objective, participants were selected in two steps. First, multinational pharmaceutical or medical device healthcare companies operating in South Africa were identified through IQVIA's 'IMS Total Private Market' data set and the online professional network service, LinkedIn. The non-probability sampling technique of purposive sampling was used to actively choose companies and participants from the lists that met the criteria of being multinational pharmaceutical or medical device healthcare companies (Palinkas et al., 2015; Saunders & Lewis, 2018). Second, within these identified organisations a 'quota and snowball sampling' technique was used to identify a heterogeneous group of individuals which met the criteria and formed part of a multinational team within their organisation and acted as an executive-level manager or leader within the domestic or global business (Palinkas et al., 2015; Saunders & Lewis, 2018).

Initial contact was made with such individuals in the identified organisations, and then these individuals assisted in identifying and volunteering two to three other executive leaders within or outside their organisations (in the same identified sector) that they believed fulfilled a similar, complex role (Palinkas et al., 2015; Saunders & Lewis, 2018). Each of these, in turn, were contacted and interviewed for data collection, as

well as asked to identify two to three other executives meeting the same profile and so on until saturation was reached (Saunders & Lewis, 2018).

The following minimum criteria were used to select individual participants for the sample population:

- Pharmaceutical or medical device healthcare sector employee in a multinational company
- Multinational team member in a role characterised by ongoing boundary spanning activities
- Manager or leadership position within the organisation domestically or globally as indicated by the title of their role (i.e. director, business unit manager, divisional head, executive, country manager, etc.)
- A host country national and not a parent or third-country national (Michailova et al., 2016)
- A minimum of at least five to ten years of full-time work experience

3.4. Measurement instrument

According to Creswell, Hanson, Clark Plano, and Morales (2007), in a phenomenological study, the researcher is exploring the essence of an individual's experience to describe a phenomenon and understand the individual's lived experience. Creswell et al. (2007) guide the researcher to utilise interviews, observations, documents, or art as valid forms of data collection for phenomenological research.

Semi-structured, in-depth interviews were selected as the primary data collection method as they allowed the researcher to capture the detail of how the participants perceived and experienced the world (McCracken, 1988). The appropriateness of this approach was confirmed by Rowley (2012) that noted how interviews are a common form of data collection in qualitative research where the researcher wants to gain insights from a few people who are in key positions. Another consideration in the choice of instrument was Rowley's (2012) reflection that such participants are less likely to use their valuable time to fill in questionnaires which are trying to elucidate a deep understanding of their opinions, attitudes, experiences, processes, behaviours or predictions. Hammarberg et al. (2016) also highlighted the relevance of semi-structured interviews as an appropriate qualitative research technique for

investigating the personal perspectives - beliefs, attitudes and concepts of normative behaviours - held in a focused topic area or by key informants.

For this qualitative research, data was collected using a two-step process to ensure the validity and reliability of the collected information, which is detailed in **Table 2**. Firstly, a pre-interview structured questionnaire was used to qualify participants using a Google Forms survey which was sent electronically to potential participants. Thereafter, interviews were scheduled with individuals that met the qualifying criteria and video conferencing semi-structured interviews were conducted using Microsoft Teams.

To follow up and verify information garnered from the first two processes, interviews were recorded after permission was sought from the participants. Recorded interviews were then transcribed using the online speech to text transcription platform, Otter.ti. No information provided in the interviews was identified as requiring further verification for validity and could be included in the analysis as recorded and transcribed.

Table 2: Data collection

Process	Data Collected
Pre-interview participant qualification survey	<ul style="list-style-type: none"> - Introductory letter and participant consent form - Name and demographic information - Confirmation of domestic managerial responsibilities and global team member role or leader - Confirmation of host country nationality - Total years of full-time working experience - Total years in current role - Current job description or title in the organisation
Semi-structured questionnaire	<ul style="list-style-type: none"> - Introductory comments - Q1: How would you describe your global organisational structure? - Q2: Do you believe that this chosen organisational structural design is suitable and why? - Q3: What is your current role in the organisation in a domestic and global context?

-
- Q4: Can you expand on the tasks associated with your role?
 - Q5: Can you expand on the relationships that are critical to your role?
 - Q6: How would you describe your leadership style?
 - Q7: Have you experienced anything or any situation that you perceive as having influenced your ability to lead in a local context?
 - Q8: If you were given the opportunity to give yourself one useful insight about this role before accepting it, what would it be?
-

According to Creswell (2013) to conduct effective phenomenological research participants need to be asked a minimum of two broad general questions: (1) "What have you experienced in terms of the phenomenon?" and (2) "What contexts or situations have typically influenced or affected your experiences of the phenomenon?" (p. 81). Creswell (2013) advises that other open-ended questions may be asked and that these should also lead to the textural and structural description of the experiences and provide an understanding of the common experiences of the participants. Tracy (2010) also noted that enough interesting and significant data to support significant claims should be pursued by the researcher. Therefore, an in-depth semi-structured questionnaire with open-ended questions was used as a tool to guide the interview process.

The researcher decided to use this tool because as pointed out by Agee (2009), even though qualitative questions evolve during the interview process, first iterations which are tentative and exploratory should be constructed to delineate the primary focus of the research at the outset. As the interview was conducted additional clarification and probing questions were used by the researcher to elicit further pertinent insights. It is important to note that the exploratory nature of this qualitative research meant that unlike in quantitative research, there was no initial hypothesis or firmed up perspective on a problem, and the researcher, in fact, sought to, "focus on the why and how of human interactions" (Agee, 2009, p. 432).

Thus, the researcher used this semi-structured interview approach to facilitate a more natural conversation that allowed the participants to focus on the aspects of context in their roles they deemed to be of most relevance to the fulfilling of their

management and leadership function within the organisation. The researcher's questions were predominantly exploratory in nature and reflected what the researcher wanted to know about the perspectives or intentions of individuals in their specific social interactions (Agee, 2009).

3.5. Data gathering process

Data was collected by the researcher using a structured questionnaire, sent electronically using Google Forms, to qualify prospective participants. Thereafter video conferencing semi-structured interviews were conducted using Microsoft Teams with selected participants. Virtual, in comparison to the normal face-to-face, interviews were necessitated by the environment in which this research took place during a worldwide pandemic related to the outbreak of COVID-19. Interviews, varying in length but approximately one hour in general, were recorded with the participants' permission. Finally, interviews were transcribed from the recordings using the online speech to text transcription platform, Otter.ti.

In total 13 video conferencing interviews were conducted. Two interviews were not recorded due to an oversight on the part of the researcher who had experienced extenuating personal circumstances. Findings from these were summarised in notes made by the researcher within 24 hours of conducting the interviews. Upon careful consideration, the researcher believed that the perspectives from these two interviews did add to the overall value of the research and were sufficiently recalled for inclusion in the data set. Data saturation was reached at the sample quota of 13 participants at which point no new relevant or different information was being discovered.

As illustrated in **Table 3**, the study participants included 13 host-country nationals that occupied senior management positions at an executive level. Participants were located domestically and were employees of either a pharmaceutical or medical device multinational company. Each participant also met the criteria of fulfilling a global team member role, characterised by ongoing boundary spanning activities and had a minimum of at least five to ten years of full-time work experience.

Six of the participants were currently subsidiary general managers, whilst the remaining seven participants held executive-level senior management roles within their respective organisations. Participants worked for ten unique MNCs with global headquarters located in seven different countries and across three different

continents. All bar two of the participants had more than 20 years of full-time work experience. All bar one of the participants were above the age of 40. There was mixed representation in terms of race and gender.

Table 3: Study participants

Participant	Current position	Full-time work experience	Years in current role	Gender	Race	Age
P1	Country Manager	20+	6 – 10	Female	White	40 – 49
P2	Sales and Marketing Director	20+	3 – 5	Female	White	40 – 49
P3	Country Head	20+	6 – 10	Female	White	50 – 59
P4	General Manager	20+	0 – 2	Male	White	50 – 59
P5	Head: Pharmaceutical Affairs	20+	3 – 5	Female	Indian	40 – 49
P6	Chief of Staff/Head of Commercial	10 – 14	0 – 2	Female	White	30 – 39
P7	Snr Director, Clinical Operations	15 -19	0 – 2	Female	White	40 – 49
P8	Head of Commercial Operations	20+	3 – 5	Male	White	50 – 59
P9	Country Manager	20+	0 – 2	Female	Coloured	40 – 49
P10	Regional Director	20+	3 – 5	Male	White	40 – 49
P11	General Manager	20+	6 – 10	Male	White	40 – 49
P12	Country Manager, SA & SSA	20+	3 – 5	Male	Black	40 – 49
P13	Business Unit Leader - Cardiology	20+	3 – 5	Female	White	40 – 49

3.6. Analysis approach

A deep understanding was sought in this research and as anticipated the open-ended nature of the exploratory questions led to rich contextual content. Therefore, as recommended by Creswell et al. (2007), a structured approach to the analysis of the data was followed to make sense of the broad base of information and varying perspectives gathered. Information was transcribed and analysed for similarities or common phenomena experienced by the individuals who fulfil these particular roles in organisations, to contribute to the relevant theories (Saunders & Lewis, 2018).

One hundred and ninety-three pages of Otter.ti transcriptions were checked and corrected to accurately reflect the information provided in the Microsoft Teams recordings. Following verification of the accuracy of transcriptions from the recorded interviews, the collected data was initially analysed using a manual technique. However, to accommodate the depth of feedback and context that was recorded the analytic process was expanded to include the cloud-based qualitative data analysis and research software, Atlas.ti. Transcriptions were imported into the cloud platform, whereupon the researcher reviewed notes and the transcriptions in combination and

assigned themes and codes which described, categorised and interpreted specific findings across the data (Saunders & Lewis, 2018).

An inductive approach was used to code the data and generate broader categories, whereby the researcher was engaged in an ongoing reflection and analysis process (Heath & Cowley, 2004). The aim of this chosen inductive process was to move the researcher from the data to empirical generalisation and finally to reflect on the data in the context of the relevant theories (Heath & Creswell, 2004). In an open coding process, the researcher conducted horizontalization of data by going through the transcripts and highlighting all statements, sentences or quotes that held particular significance to the understanding of the phenomenon being explored (Creswell, 2013). The researcher generated 430 descriptive codes and 31 code groups were created for the total data set. At this point, the researcher wrestled with the data to make sense of the findings and attempted to move from this microscopic view which was created, back to the more sensible bigger picture. Throughout this process, the researcher drew on what Tracy (2010) refers to as self-reflexivity to draw on personal experiences to make sense of the information, while attempting to eliminate biases and personal motivations which could lead to misinterpretation of the findings.

In the second phase, the researcher gradually replaced these descriptive concepts with more abstract categories. These in turn were used to develop clusters of meaning into broader themes which could be reflected on in relation to the available theory (Creswell, 2013). These were then condensed and subsumed into a few primary themes which guided the discourse of the findings (McCracken, 1988). Patterns of interrelationships between multiple categories and themes were considered, whilst relevant residual themes were used to contradict and compare to the predominant themes (McCracken, 1988). A procedure of elaboration on repeated data comparisons was followed to ensure the emergence of frameworks and shaping of the data by interpretation, rather than by deduction and verification, thereby attempting to move the analysis beyond being purely descriptive and allowing the generation of ideas from the data (Heath & Creswell, 2004). At this stage of interpretation, the researcher was focused on ensuring the credibility of the findings (Tracy, 2010). With limited means of achieving this, 'thick description' was identified as the primary method that could accurately demonstrate participants' meanings and the detail of their personal contexts (Tracy, 2010). In this way, the researcher attempted to provide enough concrete information for readers to come to their own

conclusions and veered away from trying to tell participants' stories for them (Tracy, 2010).

Combined, significant statements and themes formed the textural description of what participants experienced (Creswell, 2013). In addition, these were used to write further descriptions of the context or settings which influenced how participants experienced these phenomena, known as structural descriptions (Creswell, 2013). The researcher, which had relevant personal experience used these insights to inform the coding and categories that emerged from the data (Creswell, 2013). The final step of analysis involved writing a composite description of the structural and textural descriptions, which presented the essence of the phenomenon or the common experiences of the participants (Creswell, 2013). The researcher attempted to bring an aesthetic presentation of the data into the representation of the findings (Tracy, 2010). This style of presenting information was well suited to the selected journal and allowed the researcher to create a perspective on the environment and context which would encourage the reader to feel, think, interpret, react or change in response to the research findings (Tracy, 2010). An attempt was made to use descriptive language which readers would find transferable to their own working environments and thus more applicable (Tracy, 2010).

A firm attempt was made to steer away from any type of quantitative analysis in the approach as the intention was not to draw conclusions, but rather to explore the underlying assumptions and perceptions of participants that operated in these environments and present them in a meaningful way (McCracken, 1988).

3.7. Quality controls for validity and reliability

As highlighted by Tracy (2010) what constitutes quality is a social construct which is constantly changing and subject to the local context and current conversation. Tracy's (2010) Eight "Big-Tent" Criteria for Excellent Qualitative Research model was used to guide the quality throughout conducting this research.

According to Creswell (2013), findings can be considered valid in phenomenological research if they are well-grounded and well supported. As per Saunders and Lewis (2018), "triangulation is the use of two or more independent sources of data or data collection methods within one study in order to help ensure the data are telling you what you think they are telling you" (p. 128).

To ensure the quality of the data collected the researcher applied the strict qualifying criteria to accurately identify participants that meet the outlined area of exploration at an individual level (Saunders & Lewis, 2018; Tracy, 2010). In addition, the semi-structured questionnaire tool guided the data collection process amongst various participants and was used flexibly and evolved as new, unpredicted information which was relevant arose (Palinkas et al., 2015; Saunders & Lewis, 2018). The researcher also ascertained from the participants whether the process elucidated all the relevant contextual factors or whether they would recommend any further questions to future participants. All feedback was that the questions were open and broad enough to allow them to reflect on and communicate their full experiences. In this way, the relevant scope and depth of information retrieved from the process were expanded (Rowley, 2012; Saunders & Lewis, 2018).

Contextual findings were compared to available data from the qualifying questions, as well as independent industry data available in the public domain, and finally with all observations made by the researcher during the interview process (Tracy, 2010; Saunders & Lewis, 2018). In addition to using multiple data gathering tools, validity was further enhanced by selecting a heterogeneous population, as well as ensuring that interviews were conducted at varying times of the day as proposed as suitable by participants (Saunders & Lewis, 2018).

Further to the above, every attempt was made by the researcher to not inadvertently influence the content of the participants' descriptions, whilst the researcher also validated that the transcriptions themselves were accurate and conveyed the meaning of the participants (Creswell, 2013; Tracy, 2010). The researcher went on to ensure that the conclusions of the textural and structural descriptions, combined to form the overall essence and accurately reflected the full range of conclusions that could be drawn from the information and that no alternatives were neglected (Creswell, 2013; Tracy, 2010). As noted as important by Creswell (2013) and Tracy (2010), the researcher made every attempt to be reflexive to the emerging information throughout the study.

3.8. Limitations

One of the major limitations of this study was the choice of a specific sector of one industry, which means that the findings are not necessarily easily transmissible to other sectors. Also, qualitative data of this nature, which creates a broad perspective

on a narrow area, is not generalisable to a broader population group (McCracken, 1988).

In addition, the fact that there was only one researcher and the evaluation of the findings was subjective, the researcher's personal views and biases may have influenced the coding and analysis, and ultimately the theory development. However, it should be noted that McCracken (1988) points out that the researcher's own understanding could also provide insight. Also, as reflected on by Tracy (2010) the researcher attempted to minimise the impact of these personal affects by thoughtfully considering their potential impact throughout the research.

Using one primary method of data collection, with minor other inputs made ensuring the validity and reliability of the data a challenge. To contend with this problem, the researcher has attempted to include as much transparency as possible and full disclosure of all the processes applied throughout conducting of this research (Tracy, 2010).

Finally, as this was a cross-sectional study, the views are representative of a snapshot in time and not necessarily applicable or relevant to other future periods. This particular period in time is likely to be affected by the unique circumstances in the midst of the COVID-19 global pandemic that has changed the normative practices of businesses around the world and this may have influenced not only the research process but also the lived experiences reported on by participants.

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Appendix A: Business Horizons Author Guidelines (Elsevier, 2020)

Manuscripts submitted to Business Horizons should address topical and timely issues of relevance to business academicians and practitioners. Successful submissions will typically be structured around identifying and developing a problem or issue and providing relevant solutions. Importantly, manuscripts should go beyond description and offer sound prescriptive advice. Manuscripts should also be solidly grounded in a scholarly foundation with appropriate and judicious use of source citations. Manuscripts should also be written in clear, non-technical language, with a broad business readership in mind. While the language should be engaging and informative, authors should avoid the use of jargon and technical terminology.

Manuscripts should be prepared consistent with the following guidelines. Manuscripts which do not conform to these guidelines may be returned to the author(s) without review for reformatting.

1. Double-space, use a 12-point font with normal text spacing, and one-inch margins throughout the entire manuscript. Manuscripts should not exceed 25 pages, all-inclusive. We cannot, however, consider notes, briefs, or commentaries. All pages, save the title page, should include pagination. Page numbers should appear centered at the bottom of each page.
2. The first page of the manuscript should include the title of the manuscript and complete contact information for each author with author name, affiliation, full postal mail address, email address, telephone number, and fax number. The corresponding author should be clearly noted in the case of multiple authors.
3. The second page of the manuscript should include the title of the manuscript, an abstract of 150 to 200 words, and four to five key words or short phrases that accurately reflect the content of the manuscript. Abstracts should be designed to provide a comprehensive executive summary of the manuscript in a manner that draws the reader's attention.
4. The body of the text should begin on the third manuscript page. The manuscript text should begin with an introductory heading.
5. Incorporate headings and sub-headings throughout the manuscript to aid readability. First order headings should be centered and all capital letters. Second order headings should be centered and use both upper and lower-case letters. Headings should be descriptive and informative, yet not standard academic style.

For example, rather than use "Introduction", you might elect to use "Corporate Women: Another Look". The aim is to guide the reader with innovative and lively language.

6. Business Horizons relies on the APA (American Psychological Association) style of referencing. Authors should carefully document their work while at the same time judiciously select references. A complete list of references cited should appear at the end of the text, and preceding any tables, figures, or graphs. Only works cited in the manuscript should be included in the references section. The references should begin on a new manuscript page, with the heading REFERENCES appearing centered at the top of this page. We do not rely on footnotes or endnotes. Any full or partial with-in text quoted material should include the relevant page number(s) with the source citation (e.g., Author & Author, 2008, p.1). Please also note the use of ampersand for within text citations contained in parentheses. Citations in the text should follow the referencing style used by the American Psychological Association. You are referred to the Publication Manual of the American Psychological Association, Seventh Edition, ISBN 978-1-4338-3215-4, copies of which may be ordered online (<https://apastyle.apa.org/products/publication-manual-7th-edition>).

List: references should be arranged first alphabetically and then further sorted chronologically if necessary. More than one reference from the same author(s) in the same year must be identified by the letters 'a', 'b', 'c', etc., placed after the year of publication.

Examples:

Reference to a journal publication:

Stuart, F. I. (2006). Designing and executing memorable service experiences: Lights, camera, experiment, integrate, action! *Business Horizons*, 49(2), 149-159.

Ketchen, D., & Hult, G. T. (2007). Bridging organization theory and supply chain management: The case of best value supply chains. *Journal of Operations Management*, 25(2), 573-580.

Reference to a journal publication with an article number:

Van der Geer, J., Hanraads, J. A. J., & Lupton, R. A. (2018). The art of writing a scientific article. *Heliyon*, 19, Article e00205. <https://doi.org/10.1016/j.heliyon.2018.e00205>.

Reference to a Book:

Miller, D., & Le Breton-Miller, I. (2005). *Managing for the long run: Lessons in competitive advantage from great family businesses*. Boston: Harvard Business School Press.

Cialdini, R. B. (2001). *Influence: Science and practice* (4th ed.) Boston: Allyn & Bacon.

Edited collection:

Pfeffer, J. (1998). Understanding organizations: Concepts and controversies. In D. Gilbert, S. Fiske, & G. Lindzey (Eds.), *Handbook of social psychology* (pp. 733-777). New York: McGraw-Hill.

Geis, G. (1982). The heavy electrical equipment anti-trust cases of 1961. In M. D. Ermann & R. J. Lundman (Eds.), *Corporate and governmental deviance* (pp. 123-143). New York: Oxford University Press.

Web source:

Berry, L. L., & Seltman, K. D. (2007). Building a strong services brand: Lessons from Mayo Clinic. *Business Horizons*, 50(3), 199-209. Retrieved May 10, 2007, Retrieved from <https://www.sciencedirect.com> (<https://www.sciencedirect.com>).

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(http://money.cnn.com/2007/01/10/commentary/lewis_fortune_iphone.fortune/index.htm)

Dataset:

This journal encourages you to cite underlying or relevant datasets in your manuscript by citing them in your text and including a data reference in your Reference List. Data references should include the following elements: author name(s), dataset title, data repository, version (where available), year, and global persistent identifier. Add [dataset] immediately before the reference so we can properly identify it as a data reference. This identifier will not appear in your published article.

[Dataset] Oguro, M., Imahiro, S., Saito, S., Nakashizuka, T. (2015). *Mortality data for Japanese oak wilt disease and surrounding forest compositions*. Mendeley Data, v1. <https://doi.org/10.17632/xwj98nb39r.1> (<https://doi.org/10.17632/xwj98nb39r.1>).

7. All tables, figures, graphs, or appendices should appear individually on a separate manuscript page. These should clarify or supplement the manuscript text, not duplicate the text. Please indicate the appropriate placement of tables, figures, and graphs within the text by using [Insert Table 1 about here] place on a separate text line. These should appear following the References in the following order: tables, figures, graphs, appendices.

8. Authors should carefully proofread their manuscripts prior to submission. Please pay careful attention to spelling and grammar, in particular. Also, please rely on gender neutral language. Manuscripts with extensive errors will be returned without review. Submission of a manuscript to *Business Horizons* implies a commitment by the author(s) to engage in the review process and to have the article published should it be accepted. Articles previously published, those under consideration by another journal, and those with a pre-existing copyright may not be submitted for review and consideration. Upon submission, authors also agree not to submit the manuscript for consideration elsewhere during the review period.

This journal operates a double-blind review process. All contributions will be initially assessed by the editor for suitability for the journal. Papers deemed suitable are then sent to independent expert reviewer(s) to assess the scientific quality of the paper. The Editor is responsible for the final decision regarding acceptance or rejection of articles. The Editor's decision is final. More information (<https://www.elsevier.com/reviewers/what-is-peer-review>) on types of peer review.

9. Submit all manuscripts electronically in MS Word-compatible file format to the editor at bushor@indiana.edu (mailto: bushor@indiana.edu). Submissions will be acknowledged shortly after receipt. Editorial decisions may take up to three months. All editorial decisions are final. Articles typically appear in print 8 to 12 months after final acceptance.

10. Materials published in *Business Horizons* are available for viewing and download via ScienceDirect (<https://www.sciencedirect.com>).

11. In order to afford all authors an opportunity of publication, authors are limited to a maximum of three submissions per calendar year.

12. This journal offers authors a choice in publishing their research: Open Access and Subscription.

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EDITOR'S PERSPECTIVE

High-quality submissions

Greg Fisher

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I have now been in the position of editor-in-chief for *Business Horizons* for a little over 6 months. It is fascinating—and sometimes frustrating—to see what gets submitted to the journal. We get some wonderfully insightful articles that are energizing to read and have the potential to influence the business world substantially, and I want to embrace these ideas and nurture them to publication. However, we also get many bad submissions: submissions that are poorly written, inadequately structured, and inappropriately framed. These eat up editorial resources, yet most will never have a material impact on business practice or on the journal.

One of my goals as editor-in-chief is to increase the number of *high-quality* submissions; we do not necessarily want more submissions, but we do want more high-quality submissions. Anyone submitting to *Business Horizons* should also want to submit an article of high quality. If this is the case, we will seek out the best reviewers, work closely with you to develop your ideas, and nurture your work to publication so your ideas can be shared with the world. But what is a high-quality submission? Having now seen more than 200 submissions in a short span of time, and having carefully reviewed influential articles we have published over the past 10 years, I have developed a set of 10 guidelines to help authors generate high-quality submissions for *Business Horizons*.

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<https://doi.org/10.1016/j.bushor.2020.01.008>

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1. High-quality submissions don't take on the form of traditional academic journal articles

Business Horizons is a practice-oriented journal that shares and unpacks ideas that have an academic grounding. This is our editorial aim:

To publish original articles of interest to business academicians and practitioners. Articles cover a wide range of topical areas within the general field of business, with emphasis on identifying important business issues, problems, or opportunities and recommending means to address these. Ideally, articles will prompt readers to think about business practice in new and innovative ways. *Business Horizons* fills a unique niche among business publications by publishing articles that strike a balance between the practical and the academic. To this end, articles published in *Business Horizons* are grounded in scholarship, yet are presented in a readable, nontechnical format such that the content is accessible to a wide business audience.

Put simply, we translate theoretical perspectives and empirical insights into practical ideas that managers can use. As Leyland Pitt, one of our associate editors, said:

I like to think of the audience of *Business Horizons* as consisting mainly of 'thinking managers,' or executives who will be looking to the journal for ideas about new ways of approaching

problems and doing things differently. Another subaudience is, of course, business-school academics, many of whom use articles from the journal as prescribed readings for MBA and executive courses. These readers are looking for principles and guidelines rather than research findings.

If your article is written for a traditional academic journal, then it is not going to be a high-quality submission for *Business Horizons*; you will need to reframe, restructure, and rewrite the article in accordance with the guidelines below to transform it from an academic into a practice-oriented article.

2. High-quality submissions offer insights that are (1) novel, (2) nonobvious, and (3) useful

Articles that pay attention to only one or two of these three criteria fall short. *Novelty* means you are sharing something in the article that is different; it has not been shared before, and it is new to those reading it. *Nonobvious* means that what you are sharing has a surprise element; it is not something that almost anyone could have observed or elaborated upon. *Useful* means that it has some immediate practical application in the business world. This is different from many other journals for which theoretical contribution trumps practical relevance. At *Business Horizons*, practical relevance trumps theoretical contribution, and if an article has limited practical relevance, then it is not good for the journal.

3. High-quality submissions focus on an explicit business problem

Business Horizons is focused on helping managers and executives solve real business problems. Hence, a high-quality submission makes it clear what business problem needs to be solved. The article should contextualize when, where, why, and how the focal problem comes about and highlight what pain or negative impact the focal problem creates.

4. High-quality submissions usually present a roadmap for working through the focal business problem

These submissions highlight how the authors use their scholarship and academic understanding of an issue in an accessible and meaningful way to deal with the problem; they spell out quite clearly

how the authors transition from academia to the real world, providing practical solutions that are novel and innovative. Here, it is recommended that you state what you are going to do before you actually do it; allow your readers to understand your process first and then follow through on that process in the article.

5. High-quality submissions typically present a simple, comprehensible, and memorable structure, framework, process, or perspective for getting to the solution

Business Horizons readers are not looking for ideas that are overly complex. They want insights that are memorable, understandable, and useful. These ideas should be grounded in scholarship, but the means to get to the solution should be extremely clear, easy to use, and easy to remember. High-quality submissions systematically guide readers through the structure, framework, process, or perspective of addressing the focal problem, and they use accessible, understandable language and explanations to do so. In addition, high-quality submissions often include simple graphics or tables that convey the key message in a memorable way.

6. High-quality submissions usually provide concrete examples and anecdotes

If a submission only refers to problems and solutions in the abstract, then it will fail to connect with the core readership. High-quality submissions shift from the abstract into the practical by providing real examples to show how drastic the problem is in practice and how the proposed solution works to address the problem. Real, recent examples from the press or from your research work well.

7. High-quality submissions offer prescriptive advice but usually couple that with a discussion that addresses contingencies, complexities, and other applications

A *Business Horizons* article is ultimately evaluated on the practical advice it provides. But the provision of such advice needs to be balanced with a recognition that things may not always work out as one would expect. A high-quality submission should discuss how things might go wrong and the conditions under which the primary prescriptions might not work out.

8. High-quality submissions usually leave readers with a strong take-home message

It should be unambiguous what you want readers to take away from your article. Your take-home message should be action-oriented; highlight what readers can *do* to act on your insights or advice.

9. High-quality submissions generally make it clear that the author has read—and, if so appropriate, cited—other *Business Horizons* articles

Reading other *Business Horizons* articles gives authors a feel for the tone, structure, and framing that works for the journal. It helps authors understand the types of articles the journal publishes, how they are written, and what makes them influential in their area. Citing *Business Horizons* (if appropriate) is not intended to be self-serving; rather, it shows that you know you are joining an existing conversation in the journal and allows you to extend the conversation in novel, nonobvious, and useful ways.

10. High-quality submissions always comply strictly with the journal's submission guidelines

One of the easiest ways to show that you have not exercised due care in crafting your submission is to ignore the submission guidelines. This creates an

extremely poor impression on editors and reviewers and is grounds for outright rejection of a submission. Please comply strictly with the journal's submission guidelines, which can be found in every issue of *Business Horizons* and hosted on the journal's website.

I hope that this editorial generates many more high-quality submissions to *Business Horizons*. If we get more high-quality submissions, everyone wins: Authors win as they are more likely to get published, readers win as they get more valuable insights from the journal, and editors win as we can spend time working on articles that will have an impact. I look forward to your high-quality submissions.

Acknowledgment

I am grateful to the *Business Horizons* associate editors—Jan Kietzmann, Leyland Pitt, and Donald Kuratko—for the perspectives they have shared with me on what constitutes a high-quality submission. Many of their ideas are reflected in this editorial.

Appendix C: Example of Business Horizons Journal Article

Business Horizons (2017) 60, 45–54



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Managing millennials: Embracing generational differences



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KEYWORDS

Millennial Generation;
Millennial workforce;
Workplace culture;
Organizational
commitment;
Millennial traits;
Millennial employees;
Generational
differences;
Generation Y employee

Abstract The topic of the Millennial Generation in the workplace drives much business conversation, as members of this generation form a growing percentage of the employee base. Both popular media and scholarly literature have painted the population of younger workers in an uncharitable light. The goals of this article are to contextualize the results of a large, empirical study in a more favorable manner and to suggest that embracing generational differences provides an opportunity as well as a challenge. This article examines traits of the different generations, in addition to the relationship between organizational commitment and workplace culture. We present findings that show millennials (also known as Generation Y, or Gen Y) as the only generational group that does not conceptually link organizational commitment with workplace culture. This group also thinks of work differently than members of the other generations, yet these differences can be understood through a managerial lens focusing on qualities such as duty, drive, and reward. We argue that by changing performance evaluation metrics to encompass a greater variety of measures, managers can provide a more detailed picture of the employee's work, and thus impact the worker's sense of duty. Additionally, by providing a more transparent workplace, employers can increase the employee's drive and clearly demonstrate the reward that workers will receive. Finally, changes that help newer employees adjust to the workplace can also allow the organization to operate more efficiently, benefiting employees of all generations.

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<http://dx.doi.org/10.1016/j.bushor.2016.08.011>

1. Distinctiveness of the Millennial Generation

In an internet post dated May 11, 2015, the Pew Research Center noted that as of the first quarter of 2015, members of the Millennial Generation had surpassed their predecessors (Generation X, or Gen X) as the largest generation in the U.S. labor force (Fry, 2015). The proportion of millennials in the workforce will only continue to increase throughout the era of Baby Boomer Generation retirements. As more and more work teams face the challenge of integrating the newest working generation with older colleagues, the work environment may encounter productivity challenges if changes are not made to accommodate employees with very different attitudes and expectations.

Many of our former students who are members of Generation X (and, even older millennials) have been working their way up the corporate ladder for several years, and they now report that their younger millennial (also known as Generation Y, or Gen Y) co-workers often leave the slightly older group feeling as if they are 'old souls' in the workplace. Descriptions we have heard of the shifting work environment include the scenario of a team sitting around a table at a client's office to review papers and financial data. Gen X employees vocalize their questions and concerns, whereas millennials often text each other. Similar comments have come from both senior and experienced young professionals. Neither the type of employer nor the geographical region seems to matter.

In a more formal assessment of the generational differences in attitudes toward technology, the Cisco Corporation's 2011 *Cisco Connected World Technology Report* indicates that one-third of college students (most members of the Millennial Generation) believe that the internet is as important to the human condition as air, water, food and shelter. As a generation that has no recollection of a world before the internet, over half of the millennial respondents claimed that they, personally, could not live without the internet as an integral part of their lives, preferring to part with their sense of taste or smell rather than their smartphone while Gen X respondents treated the role of technology with slightly greater reserve (Cisco Corporation, 2011). This illustrates how different the youngest employees' way of learning, communicating, and working are relative to previous generations.

Our experiences in the classroom, coupled with our recent research, have made us aware of the importance of dealing with differences in perceptions and attitudes among the generations in the workplace. We believe that a focus on understanding

the motivations of millennials in terms of their duty, drive, and reward can help to resolve many of the challenges with an intergenerational workforce. Hershatler and Epstein (2010) report that although the values of millennials are not necessarily different from previous generations, their approach to work and the workplace is indeed different. Millennials have an experience with technology, coupled with "their positive experience inside organizations and institutions during their school years" (Hershatler & Epstein, 2010, p. 212), that impacts the modern relationship between early-career employees and organizations. The authors also argue that the expectations of millennials with respect to organizational accommodation (adjustment to the desires of the employee) provide an opportunity to utilize the many contributions that millennial employees can bring to the workplace.

This article delves into the cultural shift underway in the modern U.S. workplace. Each new generation has something to teach older colleagues, and millennials are no exception. Employers who embrace the change represented by their youngest recruits may find opportunities that will offer competitive advantages. For example, can millennial workers inspire employers to reconsider old notions about the ways in which workers demonstrate organizational commitment? Will this shift in perspective cause employers to reframe their concepts of motivation and reward?

2. Defining the generations

While there are differing terms and time frames found in the literature, the U.S. Census Bureau (2014) and Pew Research Center (2014) define the generations as shown in Table 1. Both the exact closing date for the Millennial Generation and the name of the next generation of citizens remain unresolved in the formal literature and the popular press.

The population of millennials in the U.S. currently accounts for 23% of the total population, with approximately 73 million members (U.S. Census and Bureau, 2014). Comparisons abound between today's millennials and the Baby Boomer Generation, which

Table 1. Definitions of generations

Commonly Used Name	Span of Birth Years
Silent Generation	1928–1945
Baby Boomers	1944–1964
Generation X (Gen X)	1965–1980
Millennials (Generation Y)	1981–1995

comprised the largest population of young adults in recent decades. Baby boomers made up 30% of the population and numbered close to 80 million members in 1980. Compared to Baby Boomers of three-and-a-half decades ago, the current millennial population is better educated (22% hold a college degree, contrasted with 18% of Baby Boomers in 1980) and only half as likely to have ever been married (U.S. Census and Bureau, 2014).

It may seem artificial to categorize the experiences and contributions of so-called generations, as we risk negating or overlooking significant contributions by members whose category is described negatively. Still, some scholars have written convincingly, if controversially, that there are significant generational differences in personality attributes. For example, Twenge (2013a) reports that multiple data sets indicate dramatic increases in the prevalence of narcissistic traits among members of the Millennial Generation compared to previous generations. In contrast, Arnett (2013) and his colleagues (Arnett, Trzesniewski, & Donnellan, 2013) have written in strong opposition to the labeling of an entire generation as narcissism-prone, particularly when members of the clinical professions ought to be working to dispel negative group stereotypes.

3. Millennials, positive workplace culture, and organizational commitment

We have witnessed the generational shift from our perspectives as experienced educators. We perpetually deal with 18- to 22-year-olds and have noticed that the motivational needs and interactional style of our students is not the same as it was 20 or even 10 years ago. Our students now seem to be driven by different priorities. This is a feeling echoed by many of our academic colleagues, a number of whom have been motivated to develop adaptations to the educational process designed to support the learning styles of millennials (e.g., Phillips & Trainor, 2014; Twenge, 2013b). We initially believed that our students had less drive, but began to realize that they were driven by a wider set of priorities. Our focus shifted toward helping to resolve these conflicting priorities in the classroom. The distinctive style of millennial workers has also been reflected in the evolving onboarding strategies of the major public accounting firms. Most, if not all of these firms have funded their own studies concerning the work style and mindset of this new generation of employees, and they put their findings to work in creating their own novel strategies for employee development and retention.

The banking industry and Wall Street are also responding to the changing demographics in the workforce. On March 16, 2016, Citigroup announced a plan to recruit and retain millennials with more rapid paths to promotion, year-long leaves for charitable work, and the chance to work on a micro-finance project in Kenya for four weeks. The CEO of Citigroup commented "I want people to have family lives, personal lives" (Rexrode, 2016). Goldman Sachs, Bank of America, and J.P Morgan Chase & Co. plan similar changes to appeal to millennials in terms of more interesting work tasks, charitable outreach, and faster promotions (Rexroad, 2016).

Our interest in how demographics affect the workplace was piqued when an unusual finding emerged as we analyzed a very large data set for trends in employee satisfaction and loyalty to the employer (Cravens, Oliver, Oishi, & Stewart, 2015). For this empirical study, we surveyed a large number of workers in a retail setting to explore whether a positive work environment (conveyed by managers' supportive tone and positive framing of goals) would be associated with enhanced worker loyalty, organizational commitment, and performance appraisal effectiveness. While the demographic analysis supported the main findings, different analyses of the data offer some interesting insights into what might cause stress in the workplace. We examine age (which corresponds to generation at the time of the survey) and length of employment. Findings for organizational commitment and workplace culture are summarized in Table 2.

The results of the full sample (made up of surveys from 1,798 participants) found that organizational commitment and workplace culture are each positively associated with job satisfaction, the employee's self-assessment of performance (self-performance), and intention of remaining with the employer (retention) (Cravens et al., 2015). Results by age group and length of employment show differences across the generations.

3.1. Age

In terms of organizational commitment, respondents in the millennial group (18- to 24-year-olds at the time of our data collection) believe that they perform well and will remain with the employer, but they do not find job satisfaction related to that commitment. If the workplace culture is positive, however, they find job satisfaction as well.

The second youngest age group that we surveyed, Gen X members (25- to 35-year-olds at the time of the study) were likely to be satisfied with their jobs if they perceived the workplace culture to be positive. Interestingly, those who experienced positive

Table 2. Factors associated with employees' response to work

Category 1: Age (Based on participant ages at date of survey)				
Full Sample – All Ages (n = 1,798)	Millennials (n = 323)	Generation X (n = 342)	Baby Boomers (n = 588)	Older Baby Boomers and Silent Generation (n = 545)
<i>Organizational Commitment</i> Associated with: Job Satisfaction, Self Performance, & Retention	<i>Organizational Commitment</i> Associated with: Self Performance, & Retention	<i>Organizational Commitment</i> Associated with: Job Satisfaction, & Retention	<i>Organizational Commitment</i> Results are the same as the full sample	<i>Organizational Commitment</i> Associated with: Job Satisfaction, & Retention
<i>Workplace Culture</i> Associated with: Job Satisfaction, Self Performance, & Retention	<i>Workplace Culture</i> Results are the same as the full sample	<i>Workplace Culture</i> Associated with: Job Satisfaction, & Self Performance	<i>Workplace Culture</i> Results are the same as the full sample	<i>Workplace Culture</i> Results are the same as the full sample
Category 2: Length of employment				
Full Sample - (n = 1,798)	Less than 1 Year (n = 349)	1 to 5 Years (n = 880)	6 to 15 Years (n = 427)	Greater than 15 Years (n = 142)
<i>Organizational Commitment</i> Associated with: Job Satisfaction, Self Performance, & Retention	<i>Organizational Commitment</i> Results are the same as the full sample	<i>Organizational Commitment</i> Results are the same as the full sample	<i>Organizational Commitment</i> Associated with: Job Satisfaction, & Retention	<i>Organizational Commitment</i> Associated with nothing!
<i>Workplace Culture</i> Associated with: Job Satisfaction, Self Performance, & Retention	<i>Workplace Culture</i> Results are the same as the full sample	<i>Workplace Culture</i> Results are the same as the full sample	<i>Workplace Culture</i> Results are the same as the full sample	<i>Workplace Culture</i> Associated with: Job Satisfaction, & Retention

organizational commitment did report that they intended to stay and that they were satisfied with their jobs, but just having a positive workplace is not enough to keep this age group with the employer. This finding could be related to the age of the employee rather than the generation, however. This group of sales associates may see better opportunities with options outside of the organization. It seems plausible that the Gen X workers would seek to advance their job-related growth elsewhere if it were not available at their store.

The two oldest groups were comprised mostly of Baby Boomers (36- to 49-year-olds and older at the time of the study) who responded that if the workplace culture was positive then their organizational commitment and job satisfaction were positive as well. This correlated with an intention to stay in the job. While committed to the organization, the

oldest group did not indicate that this commitment translated into good performance on the job.

Beyond the results presented in the table, our analysis shows that the millennials surveyed could not be swayed by the workplace culture of the store. Unlike employees from the Baby Boomer or Gen X groups, the millennials' results show no relationship between organizational commitment and workplace culture. In fact, every other demographic in the study shows a positive relationship between organizational commitment and workplace culture. In other words, the store could be a great place to work, yet the millennial workers would not be any more committed than if it were a lousy place to work.

As counter-intuitive as this conclusion may seem, a review of the relevant literature reveals similar findings for millennial employees in the federal government sector (Ertas, 2015), and at public relations

agencies (Gallicano, Curtin, & Matthews, 2012). Taken together, these findings suggest that, along with their generational peers in other work sectors, our retail-sector survey respondents exhibit some degree of hesitation to commit fully to their companies, even when the work setting is generally supportive and attentive to most basic employee needs.

3.2. Length of employment

As mentioned before, the study found job satisfaction, self-performance, and retention correlated to both organizational commitment and workplace culture. The length of employment (grouped as: less than 1 year, 1 to 5 years, 6 to 15 years, and greater than 15 years) did not affect the results in relationship to organizational commitment until somewhere in the sixth year or after. Those employees in the 6 to 15 year range with a positive organizational commitment intend to stay and evince job satisfaction but, like older Baby Boomers, do not report that they are performing well. By the time the employees have worked more than fifteen years, the employees' organizational commitment does not relate to any of the items the respondents were asked to assess. However, if the workplace culture is positive, the results show that this loss of interest that seems apparent in the organizational commitment results can be delayed. The employees in the 6 to 15 year group continue to respond positively, and only in the range greater than 15 years is there a perceived loss of performance.

4. Generations at work

Our findings indicate that workplace culture can serve as a ballast for organizational commitment except in the case of millennial employees. This led us to examine the motivational style of millennial workers and the literature on workplace interactions between millennial employees and older coworkers and managers. Costanza, Badger, Fraser, Severt, & Gade (2012) conducted a meta-analysis of 20 scholarly studies that analyze generational differences in work settings. On measures of work outcomes such as job satisfaction, intention for turnover, and organizational commitment, the authors report that differences across generations ranged from zero to moderate. Other studies have reported mixed support for generational differences (e.g., Ng & Feldman, 2010; Parry & Urwin, 2011; Twenge, 2010), even disagreeing over the types of methods that ought to be used to study the relationships and the distinctions between age and generation. While we do not attempt to answer the broader question of

generational differences, we find that the millennials are not similar to the workers from other generational groups in their view of the relationship between organizational commitment and workplace culture.

Even though scholars disagree, the issues must seem real enough to the companies that devote significant time and resources to studies of the changing generational mix in the workplace. For example, the accounting firm PricewaterhouseCoopers embarked on a global two-year generational study motivated by the departure of increasing numbers of millennials after relatively short tenures with the firm. If the pattern of loss had continued, PricewaterhouseCoopers would not retain sufficient entry-level talent and thus lose their future leaders. Ernst & Young, Deloitte, and KPMG (the other three large accounting firms), along with the big three strategic consulting firms and some of the large banks, have also delved into the changes that the millennial employee and consumer bring to the workplace.

The level of interest in the changing workforce combined with the results from our study led us to consider how the differences in generations might radically change how to manage, motivate, and retain a workforce. The U.S. Census data and other authors and analysts make clear that the workplace of the future will be dominated by millennial workers for some time (Fry, 2015). Despite this clear and present trend, many organizational leaders seem to deny this reality. For example, two executives from different companies discussed recent training at work on how to deal with millennials. They were both puzzled by the requirement. Finally, one asked: "Why aren't they trained to deal with us?"

In *The Next America* (Pew Research Center, 2014), Pew-sponsored researchers asked members of the different generations what made their own generation distinct, and then reported the top five responses to emerge from each group.

Table 3 shows that the top five shared experiences and priorities vary, yet all groups see themselves as smarter than other generational groups. Millennials have the highest percent of support for a single distinction—24% noted technology use as a defining characteristic. They are the only generation that does not see their work ethic as defining (Pew Research Center, 2014). Between the Baby Boomers and the younger generations at work, there is already evidence of a perspective shift related to the value of their work ethic from 17% (Boomers), to 11% (Gen X), to seemingly irrelevant (millennials). Similarly, Baby Boomers reported self-associating with general values/morals (8%), while Generation X reframed their commitment as conservative/traditional (7%) and millennials flipped

Table 3. What makes your generation distinct?

Top five responses from each generation			
Silent	Baby Boomers	Generation X	Millennials
World War II/Depression 14%	Work ethic 17%	Technology use 12%	Technology use 24%
Smarter 13%	Respectful 14%	Work ethic 11%	Music/Pop culture 11%
Honest 12%	Values/Morals 8%	Conservative/Traditional 7%	Liberal/Tolerant 7%
Work ethic 10%	Baby Boomers 6%	Smarter 6%	Smarter 6%
Values/Morals 10%	Smarter 5%	Respectful 5%	Clothes 5%

Source: Taylor & Pew Research Center (2014)

the coin to liberal/tolerant (7%). It is also interesting to note that 13% of the Silent Generation and at least 5% of each of the other generations view being smart as a defining generational feature.

For the first time in a very long time, business leaders find that their expertise needs adjustment if they are to continue motivating employees to achieve the highest standards of performance. Besides the behavioral traits of millennials, they are the most ethnically diverse generation in American history (Pew Research Center, 2014). As with any other aspect of diversity in the workplace, it is not productive for senior managers or executives to ask: "Why aren't they trained to deal with us?" If young workers do not find the work fulfilling, they will leave the firm.

5. Millennial traits and managerial challenges

Baby Boomers changed the face of work in America. It was after their young adulthood that workplace policies evolved to address equal opportunity and affirmative action issues. Adjustments to retirement and health care benefits, flexible spending accounts for medical and dependent care spending also ensued. As the younger, trailing end of Generation X gave way to the leading population of millennials in the workplace, consultants on workplace dynamics and other thought leaders have offered many successful books that were published to advise business leaders on the best ways of navigating a significant trend. By 2010, when Lancaster and Stillman published *The M-Factor*, a range of negative attributes had created an unpleasant stereotype of the millennial worker. These features included seeming lazy, defensiveness, lack of initiative, unwillingness to commit fully to work, disrespect of authority, lack of focus, distractedness, lack of

preparation for the workplace, neediness, indifference, lack of etiquette, arrogance, abrasiveness, impatience, self-absorption, and entitlement. This unappealing caricature has been referenced in a number of books written to advise managers on how to move beyond unfair and negative pre-existing stereotypes (e.g., Caraher, 2015; Espinoza, Ukleja, & Rusch, 2010; Lancaster & Stillman, 2010).

6. Turning a negative stereotype into positive performance

The previous sections highlight the workplace conflict in this current intergenerational shift. Results from our research study demonstrate the disconnect of millennials between organizational commitment and workplace culture, and reinforce the need for employers to address retention issues. Surveys from various accounting and consulting firms suggest that millennials exhibit needs and values unlike their older colleagues in the workplace. How do we embrace, rather than fight, these generational differences and foster a positive workplace culture?

We suggest that modifying workplace culture and the performance appraisal process can create an environment in which millennials can thrive and display a different type of organizational commitment. Changes designed to address the motivations and retention of millennial workers have the potential to benefit all employees. Through the performance appraisal process, managers have an opportunity to show millennials how their contributions fit within the larger context of the organization. By linking individual contributions directly to specific organizational objectives, millennials are able to reinforce their direct personal contributions to the team. Focusing on performance appraisal that links specific contributions to positive organizational outcomes supports retention for all

employees as they readily appreciate their value to the enterprise. When employees of any generation see how their contributions are valued, they are more open to commit to an organization.

After reviewing both empirical research and popular literature, Myers and Sadaghiani (2010) identified three traits of millennials that affect their interactions and relationships in the workplace. Millennials seek a team-based workplace culture with close contact and communication with superiors as well as frequent feedback (Gursoy, Maier, & Chi, 2008; Martin, 2005). Myers and Sadaghiani (2010) conclude that millennials value different things in the workplace relative to previous generations. These different values can cause retention issues, particularly in industries where long work hours and other demands can be quite excessive at critical times during the year. However, with a performance appraisal process that considers the individual in the context of a team working towards a common objective, millennials will be able to create the types of relationships that they value.

To support open communication and the types of relationships that allow millennials to thrive and contribute to their organization, senior management must solidify their expectations with respect to the contributions of employees at all levels. This would ensure that all activities are directed toward organizational goals. The performance appraisal process must be modified from a general measure of performance across basic activities to focus on specific goals and tasks related to organizational objectives. This requires defining specific desired activities so as to evaluate the employee in terms of their overall contribution to organizational strategy.

For example, if a component of a retailer's strategy is focused on customer satisfaction, the performance appraisal process must address how each employee might specifically contribute to this objective. Sales associates will likely understand their roles, but employees without direct contact with customers may require more specific insight. Buyers, operations managers, inventory controllers, and shipping clerks all have a role to play in terms of influencing customer satisfaction. The evaluation forms and review process need to emphasize the employee's place in meeting organizational objectives.

7. Reframing objectives for all generations: Duty, drive, and reward

7.1. Duty

Older workers have long held well-established assumptions regarding how one conveys a proper sense

of duty in the workplace. Many Silent and Baby Boomer Generation professionals have always done more than any boss ever explicitly demanded. In contrast, millennials show greater likelihood to limit their efforts to the minimum output required to meet a supervisor's request. Since millennials are constantly connected to work through technology, older workers may not be aware of the efforts of millennials outside of the traditional work day. The performance appraisal process needs to reflect the contributions of employees, rather than merely provide a list of their efforts.

PricewaterhouseCoopers (2013, p. 8) found that "millennials do not believe that productivity should be measured by the number of hours worked at the office, but by the output of the work performed... [They] view work as a 'thing' and not a 'place'." Thus, the performance appraisal process should concentrate on outcomes in terms of specific objectives. Recognizing only the time spent on a project or task does not link the activity or the employee's contribution to the overall organizational goals.

Similarly, the performance appraisal process should focus on positive contributions rather than count failures. In many ways, failures are learning opportunities for the employee as well as for the organization. Framing the failure as a positive in terms of knowledge acquisition encourages the employee to seek alternatives to meet organizational goals. This is the type of innovation at which millennials excel and which can greatly affect the organization. Instead of creating boundaries of performance by framing tasks within a narrow perspective, managers can position work requests in terms of a larger organizational context. This encourages millennials to extend their efforts beyond the low bar of simple task completion (or checking the box). The freedom and flexibility to be creative in solutions to problems or tasks increases the positive experiences for the employee of any generation in the workplace. The focus is less on a timesheet documenting effort and more on a collection of supportive activities and outcomes that can be incorporated into a comprehensive system of communication.

In a retail setting, asking sales associates to increase sales clearly provides a task that contributes to organizational objectives. However, employees may not be given any specific suggestions as to how to accomplish this objective. A performance appraisal process that provides specific suggestions and documents how the employee was creative in striving for this outcome not only allows a focus on efforts, but also considers how the employee worked as a team member. This type of directive

requires sufficient flexibility to permit the employee to do more than merely check off items on an appraisal checklist. The sales associate should be able to document the results of their specific efforts and to articulate these efforts with colleagues and superiors. Questions such as: 'How did you increase sales during a slow time at the store?', 'How did you increase sales to customers who were new to the store?', and 'In what ways did your actions help other employees increase sales for the store?' provide the employee with the freedom to be creative within a specific objective.

Since the workplace environment and individual performance are comprised of a multitude of factors rather than a single score to indicate achievement, the above questions place the actions of the employee within a larger context. Rewarding the employee for an increase in sales without investigating the cause or contribution gives the signal that only the outcome matters. This is not effective for millennials, and also misses an opportunity for the performance appraisal process to collect information that might be useful for all employees. The performance appraisal process can be enhanced to showcase the efforts that lead to high levels of achievement. Many existing, traditional forms of performance appraisal may be too narrow and too infrequent to document performance appropriately.

7.2. Drive

According to PricewaterhouseCoopers, workers of every generation have virtually the same reasons for remaining with or leaving a firm, but the order of importance of these reasons to their decision differs. The aforementioned study finds that "millennials have a greater expectation to be supported and appreciated in return for their contributions, and to be part of a cohesive team" (PricewaterhouseCoopers, 2013, p. 9). Senior members of an organization were probably taught to accept direction from a superior without question. This is both a sign of appropriate respect and a reflection of early acculturation to the value of organizational hierarchy. The assumptions of older workers about the clarity of linear relationships (including those represented on organizational charts) are not always held by the newest generation of workers. As Myers and Sadaghiani (2010) also note, millennials prefer close relationships with open communication in a team environment. Group work is inherent in public accounting, consulting, and other industries, so the challenge of these industry organizations is to make the teams more open. Other organizations may need to adapt and build in teamwork and

translate this environment to the performance evaluation process. Individuals must also be evaluated in terms of their individual contributions to the team. Since millennials appear to prefer the synergistic decision-making environment of teams, it is possible to alter the workplace culture to enhance the benefits of teamwork and formalize the type of communication process that millennials seek. More frequent and closer interaction with superiors can be formalized in a performance evaluation plan that increases overall organizational communication. More experienced employees need to be encouraged to share appropriate information with newer members of the team, expanding or reinventing the interpretation of organizational structure.

Millennials need to accept that increased access to information is often associated with increased levels of responsibility (Myers & Sadaghiani, 2010). Yet managers should consider that providing millennials with greater access to higher-level information might lead to widespread organizational benefits. With more awareness of the strategic intent and progress of the organization, millennials may be more involved in supporting the organizational mission. Research suggests that bringing lower-level workers into the conversation would increase organizational attachment (Myers & Oetzel, 2003) and perhaps reduce boredom, which is often cited as a reason for departure (Alsop, 2008).

7.3. Reward

Millennials are the product of an era of rewarding all children who show up to play a sport, giving trophies and ribbons to each participant whether or not they exhibited high levels of performance. PricewaterhouseCoopers (2013, p. 8) indicates that "41% of Millennials prefer to be rewarded or recognized for their work at least monthly, if not more frequently, whereas only 30% of non-millennials would like that level of frequency." The Silent Generation, Baby Boomer, and Generation X populations typically entered the workplace with clear expectations about the step-wise progression to promotions in perks, salary, and rank. For these older workers, the notion of paying one's dues at work included time spent doing menial, unglamorous office tasks, knowing that the less desirable duties would pass one day to a new crop of novice workers. The reward for time spent laboring in the so-called trenches was the growth in challenge and responsibility as well as the prestige that comes with having earned a higher position, or showing evidence of progressing through the ranks.

The popular press suggests that millennials are commonly unfamiliar with the types of rewards that

would be appropriate for contributors at different stages of a career. While older workers may label these behaviors as self-absorbed or arrogant, the reality is that millennials are often genuinely unaware of the critical link between lower-level work and upper-level management. Working one's way up from the front-line work of a business to the corporate suite is not featured prominently on the internet. Again, basic training about the corporate values of effort and rewards should circumvent frustrations. It would be especially helpful to coordinate these messages with a realignment of the reward structure, where necessary, to provide for more frequent, tangible evidence of appreciation for each critical component of a job well done. With a performance appraisal process centered on an individual's contributions in a team environment, frequent assessment of activities would satisfy the millennials' need for feedback. This process would also provide an opportunity for all employees to adjust their actions toward achieving organizational goals, rather than receiving the information too late at the end of a longer evaluation period.

8. A training opportunity

Their educational path and other early life experiences may not prepare millennials for successful entry into a workplace shaped by the Baby Boomers or previous generations. In order to move quickly past the frustrations accompanying this reality, onboarding and early development programming should provide millennials with a means to navigate the mysterious complexities of the workplace.

A summary approach to address misperceptions related to the value of duty or work obligations involves developing communication strategies that recognize all forms of input and engagement displayed by younger workers. Performance evaluations may need to be more frequent with enhanced feedback on a variety of performance outcomes and contributions in the context of a team of employees.

Learning how to motivate the employee's drive to perform will reward teams and organizations, as well as individuals. Millennials may not be the only group to benefit from more intentional reminders about the connections between the individual worker's contributions and corporate strategy and vision. Each organization should consider how its own culture represents rewards, both intrinsically and extrinsically (or monetarily). In addition, the organization should evaluate the workplace culture combined with a feedback and reward system to reflect the values of all workers, as well as corporate

values. With this approach, the potential exists to improve employee engagement and thus increase organizational outcomes as well as personal rewards for employees.

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Appendix D: Questionnaire and/or interview schedule

Pre-interview Guide

Gender (Please indicate with an X)

Male	<input type="checkbox"/>
Female	<input type="checkbox"/>
Other	<input type="checkbox"/>

Age Group (Please indicate with an X)

20 – 29 Years	<input type="checkbox"/>
30-39 Years	<input type="checkbox"/>
40-49 Years	<input type="checkbox"/>
50-59 Years	<input type="checkbox"/>
60+	<input type="checkbox"/>

Question 1

In your current role do you have domestic managerial responsibilities, including oversight of a department or team, whilst simultaneously fulfilling a role as a global team member or leader? (Please indicate with an X)

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Other (please clarify below)	<input type="checkbox"/>

Question 2

Are you a citizen or permanent resident of South Africa? (Please indicate with an X)

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

Question 3

How many years full-time work experience do you have? (Please indicate with an X)

0 – 4 years	<input type="checkbox"/>
5 – 9 years	<input type="checkbox"/>
10 – 14 years	<input type="checkbox"/>
15 – 19 years	<input type="checkbox"/>
20+ years	<input type="checkbox"/>

Question 4 (Please indicate with an X)

How many years work experience do you have in your current role?

0 – 2 years	
3 – 5 years	
6 – 10 years	
11 – 15 years	
16+ years	

Question 5

Would you be able to afford me 45- to 60-minutes of your time for a face-to-face interview?

Yes	
No	

Draft questionnaire/Interview guide

According to Creswell (2013) to conduct effective phenomenological research participants need to be asked a minimum of two broad general questions: (1) “What have you experienced in terms of the phenomenon?” and (2) “What contexts or situations have typically influenced or affected your experiences of the phenomenon?” (p. 81). Creswell (2013) advises that other open-ended questions may be asked and that these should also lead to textural and structural description of the experiences and provide understanding of the common experiences of the participants.

Introduction

Thank you for agreeing to participate in this interview which will contribute to my research project in fulfilment of the criteria of an MBA through GIBS. I will ask you a number of questions relating to your organisation, role and personal experience in fulfilling the requirements of your role. Please answer as directly and comprehensively as possible. If any question is not clear to you, kindly ask for further clarification before proceeding to answer.

Question 1

How would you describe your global organisational structure?

Question 2

Do you believe that this chosen organisational structural design is suitable and why?

Prompts for the interviewer:

- Size, shape, and type of organisation
- Degree of formalisation and centralisation
- Hierarchical level of individuals and groups under consideration
- Spatial distances between individuals/groups
- Organisational culture or climate
- Strategy or goals/purposes of the organisations
- Composition of the people in the organisation
- Types of technology, processes and policies in use and degree of standardisation
- State/condition and organisational health
- Organisational life cycle stage and current duration of leadership effects
- The environment

Question 3

What is your current role in the organisation in a domestic and global context?

Question 4

Can you expand on the tasks associated with your role?

Question 5

Can you expand on the relationships that are critical to your role?

Prompts for the interviewer:

- Task responsibility
- Relationships maintained
- Daily/weekly/monthly expectations
- Complexity experienced in these dimensions

Question 6

How would you describe your leadership style?

Question 7

Have you experienced anything or any situation that you perceive as having influenced your ability to lead in a local context?

Question 8

If you were given the opportunity to give yourself one useful insight about this role before accepting it, what would it be?

Concluding remarks

Is there anything further you have thought of that you would like to add as a concluding remark or guidance you can offer on conducting this interview with other participants?

Appendix E: Plagiarism declaration

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.

Bronwen Coleman

A handwritten signature in black ink, appearing to read 'Bronwen Coleman', with a long horizontal flourish extending to the right.

30 November 2020

Appendix F: Copyright declaration

Student details			
Surname:	Coleman	Initials:	B
Student number:	97063500		
Email:	97063500@mygibs.co.za		
Phone:	0823714160		
Qualification details			
Degree:	MBA	Year completed:	2020
Title of research:	GIBS		
Supervisor:	Hayley Pearson		
Supervisor email:	pearsonh@gibs.co.za		
Access			
A.	My research is not confidential and may be made available in the GIBS Information Centre on UPSpace.		
I give permission to display my email address on the UPSpace website			
Yes	X	No	
B.	My research is confidential and may NOT be made available in the GIBS Information Centre nor on UPSpace.		
Please indicate embargo period requested			
Two years		Please attach a letter of motivation to substantiate your request. Without a letter embargo will not be granted.	
Permanent		Permission from the Vice-Principal: Research and Postgraduate Studies at UP is required for permanent embargo. Please attach a copy permission letter. Without a letter permanent embargo will not be granted.	
Copyright declaration			
I hereby declare that I have not used unethical research practices nor gained material dishonesty in this electronic version of my research submitted. Where appropriate, written permission statement(s) were obtained from the owner(s) of third-party copyrighted matter included in my research, allowing distribution as specified below.			

I hereby assign, transfer and make over to the University of Pretoria my rights of copyright in the submitted work to the extent that it has not already been affected in terms of the contract I entered into at registration. I understand that all rights with regard to the intellectual property of my research, vest in the University who has the right to reproduce, distribute and/or publish the work in any manner it may deem fit.

Signature:



Date: 24 November 2020

Supervisor Signature:



Date: 25 November 2020

Appendix G: Certification of Data Analysis Support Form

(Additional support retained or not - to be completed by all students)

Please note that failure to comply and report on this honestly will result in disciplinary action

I hereby certify that (please indicate which statement applies):

- **I DID NOT RECEIVE** any additional/outside assistance (i.e. statistical, transcriptional, and/or editorial services) on my research report:



This statement applies to my research.....

- **I RECEIVED** additional/outside assistance (i.e. statistical, transcriptional, and/or editorial services) on my research report:

N/A.....

If any additional services were retained– please indicate below which:

- Statistician
- Transcriber
- Editor
- Other (please specify:.....)

Please provide the name(s) and contact details of all retained:

NAME:.....

EMAIL ADDRESS:

CONTACT NUMBER:

TYPE OF SERVICE:

I hereby declare that all *statistical write-ups and thematic interpretations of the results for my study were completed by myself without outside assistance*

NAME OF STUDENT:

Bronwen Coleman.....

SIGNATURE:



.....

STUDENT NUMBER:

97063500.....

STUDENT EMAIL ADDRESS:

97063500@mygibs.co.za.....

Appendix H: Ethical clearance letter

GIBS ETHICAL CLEARANCE APPLICATION FORM 2020

RESEARCH PROJECT INFORMATION

NAME:	Bronwen Coleman
STUDENT NUMBER:	97063500
PHONE NUMBER:	
E-MAIL ADDRESS:	97063500@mygibs.co.za
PROPOSED TITLE OF STUDY:	Exploring the personal impact of task and relationship complexity on leaders in boundary spanning roles in a global context, and on their ability to lead domestic or global businesses.
RESEARCH SUPERVISOR:	Hayley Pearson
E-MAIL OF SUPERVISOR:	Pearsonh@gibs.co.za

The purpose of this Research Ethics process is to ensure that all research conducted under the auspices of GIBS is done so in an ethical manner, in accordance with the University's policy and in such a way that the rights of all stakeholders associated with the research are protected.

In order for the GIBS Research Ethics Committee to assess your application, you are required to submit a **description of your Research Methodology** that must contain sufficient detail to ensure that the required steps have been taken to achieve this purpose, in the research design, data collection, analysis and storage of data used in the conduct of this research.

Please indicate the nature of the output your research is aimed at producing (mark one box only):

- PGDip Applied Business Project
- MBA/MPhil Research Report
- MBA Project Publish Article
- MBA Teaching Case Study
- MBA Entrepreneurship Stream Portfolio
- MBA Consulting Stream Portfolio
- GIBS Faculty/Research Associate/Staff member or others undertaking research under the GIBS affiliation

GIBS Ethics Policy distinguishes between FOUR main types of data and THREE main types of methodology. Please complete the table for ALL the data types that you plan to use. Note that all applications must be accompanied by a description of the methodology to be used in the study. Initial all sections that apply to your research

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Section of form and type of data or methodology	Attachments – including methodology chapter (please mark that they are included)
A Pre-existing personal records of human subjects, e.g. performance reviews	<input type="checkbox"/> Methodology section of proposal <input type="checkbox"/> Description of the nature of the records to be used <input type="checkbox"/> Permission letter from appropriately authorised person in the organisation to use the data
B New data solicited from human subjects, e.g. through interviews or surveys	<input checked="" type="checkbox"/> Methodology section of proposal <input checked="" type="checkbox"/> informed consent statement (separate for qualitative data collection; as part of survey questionnaire for quantitative data collection) <input checked="" type="checkbox"/> Interview guide / survey questionnaire / pre-existing proprietary test instrument / description of intervention <input checked="" type="checkbox"/> IF pre-existing proprietary test instrument, letter of permission from the owner/copyright holder (e.g. the MBTI)
C Public non-human data, e.g. World Bank or other databases (no letter needed)	<input type="checkbox"/> Methodology section of proposal <input type="checkbox"/> Explanation of the nature of the data, how you will source it and how you will use it
D Private Organisation-specific non-human data, e.g. financial statements, marketing or safety records	<input type="checkbox"/> Methodology section of proposal <input type="checkbox"/> Explanation of the nature of the data, how you will source it and how you will use it <input type="checkbox"/> Permission letter from the owner/organisation to use the data
E Indicate which methodology you will be using. Choose one only	<input checked="" type="checkbox"/> Qualitative <input type="checkbox"/> Quantitative <input type="checkbox"/> Mixed methods

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SECTION A. PRE-EXISTING PERSONAL RECORDS OF HUMAN SUBJECTS

1. Specify the nature of records and how they will be used
2. Confirm that permission has been obtained from an appropriately authorised person to study and report on these records.

Remember to attach permission letter(s).

I confirm

3. Provide the name and job title of the person in the organisation who has authorised the use of the records.

Name:

Job Title:

4. In the event that individual data is to be reported, how will anonymity be assured?

Mark all that apply – ensure this is included in your methodology chapter.

- No names will be requested
- No names will be reported
- Data will be stored without identifiers
- Only aggregated information will be provided
- Other. Please specify

SECTION B. NEW DATA OBTAINED FROM HUMAN SUBJECTS

5. Does the nature of your research require you to collect data from respondents who constitute a 'vulnerable population' (defined as those who are particularly susceptible to coercion or undue influence or who have difficulty giving free and informed consent to being the subjects of research)

No

Yes.

IF yes, explain the nature of the population and what measures will be put in place done to reduce or minimise this vulnerability. Ensure this is included in your methodology chapter.

6. Please confirm that no incentive is to be offered to respondents to participate in the study.

I confirm

7. Mark the applicable box(es) to identify the proposed procedure(s) to be carried out to obtain data.

Interview guide Attach if applicable

Survey questionnaire Attach if applicable

Pre-existing proprietary test instrument, e.g. MBTI Attach if applicable

IF a pre-existing proprietary test instrument is used, confirm that permission has been obtained to use it.

I confirm

Remember to attach permission letter(s) to use proprietary test instrument/s from an appropriately authorised person.

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- Intervention, e.g. training or experiment Describe in full in methodology chapter
8. Confirm that the data gathering is accompanied by a consent statement.
- I confirm
9. Where is the consent statement found?
- As part of the survey questionnaire, if quantitative data collection, in the introduction section of the questionnaire.
- As a separate document, if qualitative data collection, remember to attach.
10. Is there a risk that the respondents may not fully understand the nature of the study, or instructions or questions, or their rights as a result of language barriers between themselves and the researcher?
- No, there is not a risk
- Yes, there is a risk.
IF yes, how will the subjects' full comprehension of the content of the research, including giving consent, be ensured? Please specify, and include in methodology chapter
11. Do any respondents risk possible harm or disadvantage (e.g. financial, legal, reputational or social) by participating in the research?
- No
- Yes.
IF yes, explain what types of risk and what is done to minimise and mitigate those risks and include in methodology chapter.
12. Are there any aspects of the research about which subjects are not to be informed?
- No
- Yes.
IF yes, explain why, and how subjects will be debriefed, and include in methodology chapter.
13. Will the audio or video recorded data be transcribed and/or translated by an independent transcriber and/or translator?
- No
- Yes.
If yes, confirm that the transcriber and/or translator will be required to sign a non-disclosure agreement to protect the respondent's confidentiality, and include in methodology chapter
- I confirm. Remember to attach a pro-forma non-disclosure agreement
14. How will **confidentiality** (when the identity of the respondent is known to the researcher e.g. when data collection is via interviews) and/or **anonymity** (when the identity of the interviewer is not known to the researcher e.g. when data collection is via surveys) of the respondents and their data be assured? Include in methodology chapter
- No names will be requested, relevant when the identity of the respondent is not known to the researcher
- No names of individuals or organisations will be reported, relevant when the identity of the respondent is known to the researcher

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- Only aggregated information will be reported
- Data will be stored without identifiers
- Other. Please specify

15. Is the topic of your research and the nature of the interview or survey questions about one or more particular organisations or to be conducted within one or more particular organisations?

- No
- Yes. If yes, confirm that appropriately authorised person/s have provided written permission for you to conduct this research
- I confirm. Remember to attach signed permission letter/s

SECTION C. PUBLIC NON-HUMAN DATA

16. Specify the nature of records to be used: Explain how they will be selected, where the data will be sourced and how the data will be used, and include in methodology chapter:

17. Confirm that this pre-existing non-human data is in the public domain, is legally accessible and is free of any copyright.

- I confirm

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SECTION D. PRIVATE ORGANISATION-SPECIFIC NON-HUMAN DATA

18. Specify the nature of records (e.g. financial reports, marketing reports or safety records) and how they will be used.

19. Confirm that permission has been obtained to study and report on these records.

I confirm. Remember to attach permission letter(s).

20. Provide the name and job title of the person in the organisation who has authorised the use of the records.

Name: _____ Job Title: _____

21. Do companies risk possible harm or disadvantage (e.g. financial, legal, reputational or social) by participating in the research?

- No
- Yes. Explain what types of risk and what is done to minimise and mitigate those risks. Include explanation in methodology chapter

22. How will **confidentiality** (when the identity of the respondent is known to the researcher e.g. when data collection is via interviews) and/or **anonymity** (when the identity of the interviewer is not known to the researcher e.g. when data collection is via surveys) of the respondents and their data be assured? Include in methodology chapter

- No names will be requested, relevant when the identity of the respondent is not known to the researcher
- No names of individuals or organisations will be reported, relevant when the identity of the respondent is known to the researcher
- Only aggregated information will be reported
- Data will be stored without identifiers
- Other. Please specify

GIBS ETHICAL CLEARANCE APPLICATION FORM 2020

ALL APPLICANTS MUST COMPLETE SECTIONS E AND F

E. CONFIDENTIALITY OF RESEARCH REPORT SUBMITTED FOR EXAMINATION OR PUBLICATION

23. Please select the relevant option relating to the confidentiality of the research report you will submit for examination:

- Free access, i.e. report not embargoed
- No access for a period of two years after research report is submitted for examination
Note that in exceptional circumstances, GIBS, being the copyright holder of the published research, may consent to an embargo of the report submitted for examination for a period of no more than two years. If you wish to apply for such an embargo, please provide reasons for this in a separate attachment.
- No access under any circumstance for an undetermined period.
A letter of permission from the Vice- principal: Research and Postgraduate Studies at the University of Pretoria must be obtained prior to making this application – and attached to this application for ethical clearance.

F. DATA STORAGE AND DISSEMINATION OF RESEARCH REPORT SUBMITTED FOR EXAMINATION

24. Please confirm that you will use appropriate methods to ensure your data is safely stored in an accessible format for a minimum period of 10 years

- I confirm

25. Confirm that the details of your data storage method are set out in your attached methodology chapter

- I confirm

26. It is a goal of GIBS to make research available as broadly as possible. Mark the boxes below for the medium/media in which you do NOT wish results to be made available.

- | Academic dissemination | Popular dissemination |
|---|--------------------------------------|
| <input type="checkbox"/> Research report | <input type="checkbox"/> TV |
| <input type="checkbox"/> Scientific article | <input type="checkbox"/> Radio |
| <input type="checkbox"/> Conference paper | <input type="checkbox"/> Lay article |
| <input type="checkbox"/> Book | <input type="checkbox"/> Podcast |
| | <input type="checkbox"/> Book |

Provide reasons for any limitation on publication marked above

27. Confirm that the consent obtained is aligned with the extent of dissemination. For example, consent if you are planning to use the research to launch a consulting career will be more comprehensive than in the case of research that is intended only for a scientific audience.

- I confirm

28. IF you wish to describe any other information which may be of value to the committee in reviewing your application

- No
- Yes. Provide details in a separate sheet attached to this application

GIBS ETHICAL CLEARANCE APPLICATION FORM 2020

G. APPROVALS FOR/OFF THIS APPLICATION

When the applicant is a student of GIBS, the applicant must please ensure that the supervisor and co-supervisor (where relevant) has signed the form before submission

STUDENT RESEARCHER/APPLICANT:

29. I affirm that all relevant information has been provided in this form and its attachments and that all statements made are correct.

Student Researcher's Name in capital letters: BRONWEN COLEMAN

Date: 29 Aug 2020

Supervisor Name in capital letters: HAYLEY PEARSON

Date: 29 Aug 2020

Co-supervisor Name in capital letters:

Date: 29 Aug 2020

Note: GIBS shall do everything in its power to protect the personal information supplied herein, in accordance to its company privacy policies as well the Protection of Personal Information Act, 2013. Access to all of the above provided personal information is restricted, only employees who need the information to perform a specific job are granted access to this information.

FOR DOCTORAL AND FACULTY/RESEARCH ASSOCIATE/STAFF MEMBER RESEARCH ONLY

Approved

REC comments:

Date: 17 Sep 2020