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Doing it right: procurement talent for the 21st century

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DOING IT RIGHT: DEVELOPING PROCUREMENT TALENT FOR THE 21ST CENTURY

A dissertation submitted in partial satisfaction

of the requirements for the degree of

Doctor of Education in Organizational Leadership

by

Charles Edward Bray, Jr.

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This dissertation, written by

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DEDICATION

I dedicate this work to my grandparents and my mother. Wiley Bankston (Gramps) was truly my father. He showed me patience and love from my birth until his death at 96 years old, when I was in my mid-40s. He taught me the meaning of love, faithfulness and hard work. He still is my hero and a great source of inspiration. Eva Perry Bankston (Granny) served and protected me from childhood until her untimely death in my early twenties. She watched over me and kept me safe from ills and challenges that befell others around me. My final dedication is to my mom -- Ruby A. Bray. She worked tirelessly to provide me the opportunity to have a great education and to succeed in life at great personal cost. For much of my life, I thought I grew up in a single parent home. Only later did I realize that I had three loving parents each of whom made a profound impact on my life. My hope and prayer is to live up to their example of love and sacrifice.

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First, I acknowledge my Lord and Savior Jesus Christ who makes all things possible through the strength He provides. As a practical man who believes in Jesus, I recognize that hard work and perseverance are an important part of my life's journey. However, I give Jesus the credit for giving me the fortitude to stay on this path. I can do all things through Christ who gives me strength.

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VITA

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ABSTRACT

An effective procurement strategy positively affects a company's ability to drive profitability and

to maintain a sustainable competitive advantage. However, some procurement leaders do not

believe their teams have the skill to execute their company's strategy. Pundits cite a shortage of

qualified personnel, and deficiencies in leadership, soft skills, and critical thinking ability.

Companies, therefore, must recruit, develop, and retain personnel to execute properly their

procurement strategies. Research literature states that employee engagement, transformational

leadership, and emotional intelligence affect an employee's willingness to learn and intention to

stay at a firm. A compendium of literature also links organizational performance and business

outcomes to leadership style, employee engagement and emotional intelligence levels within an

organization. Based on the literature, a leader's style, emotional intelligence and ability to foster

employee engagement has an impact on organizational performance. How can leaders

effectively develop procurement personnel to address today's marketplace challenges and

opportunities? Informed by literature, this phenomenological study examines the best practices

employed by today's procurement leaders to develop personnel. In addition, this study examines

challenges these managers face in developing employees, and the metrics employed to define

success in procurement staff development. The study also summarizes recommendations from

today's procurement leaders to future generations of managers on employee development best

practices. Finally, the study contains conclusions, thoughts, and recommendations based on

insights gleaned from the study's participants.

Keywords: procurement talent development, supply chain talent, transformational

leadership, emotional intelligence, employee engagement

Chapter 1: Introduction

An effective procurement strategy positively affects the ability of a company to drive profitability through its supply chain (Mena, Van Hoek, & Christopher, 2018). However, over half of the 504 leaders surveyed in the Deloitte Global Chief Procurement Officer Survey did not believe their teams had the requisite skill to execute their company's procurement strategy (Umbenhauer et al., 2018). Specifically, respondents cited talent deficiencies in leadership, innovation, and digital transformation. The chief procurement officers also felt their organizations were less proficient in pioneering change, inspiring others, and in talent development (Umbenhauer et al., 2018). Industry experts are making an effort to address the talent development gap. However, their efforts to do so are inconsistent (Harrington, 2015; Umbenhauer, et al., 2018).

Additional industry literature also notes the importance of talent development to procurement and the supply chain. While some experts cite adequate staff preparation in data analytics and process control, they also note gaps in soft skills and emotional intelligence (Harrington, 2015; Ruamsook & Craighead, 2014). Ruamsook and Craighead (2014) elaborated and described a perfect storm of talent deficiencies, increased demand for supply chain staff, and a shortage of supply chain instructors, as contributors to the scarcity of qualified procurement personnel. In the DHL sponsored *Automotive Industry Brief,* Harrington (2015) characterized the talent pipeline situation in the supply chain industry as a global crisis in need of a solution. Harrington (2015) also discussed the need for supply chain and procurement leaders to author more efficient talent development, recruitment, and retention strategies. She elaborated and cited the inability of universities alone to produce enough skilled workers to address sufficiently the talent gap (Harrington, 2015).

Other writers also detail a shortage of qualified supply chain personnel. Gravier (2017) theorized that the talent shortage emanates from poor talent management strategies rather than a scarcity of talent. He noted that millennials have a greater need for personal engagement with the corporate vision to maximize involvement and productivity. In her report on supply chain talent, Cecere (2014) said the biggest gap in the supply chain talent pipeline was in developing existing employees. She also said another large skill gap was in middle management, followed by a skill gap for entry-level workers. Christopher (2016) cited the difficulty firms have in developing teams with the requisite breadth of skill and flexibility to meet today's supply chain challenges.

In summary, multiple industry writers concur on the gap in skill level and in the availability of supply chain personnel including procurement staff. The gap has the potential to adversely impact supply chains and thus business performance for companies worldwide. Leading firms seek to leverage their procurement activities to drive competitive advantage and outperform their competitors (Pettey & van der Meulen, 2018; Umbenhauer et al., 2018). Companies must therefore actively recruit, develop, and retain talented personnel to execute their supply chain and procurement strategies in support of organizational objectives.

The aforementioned literature also proposes several solutions to address the need to develop a more robust cadre of qualified procurement personnel. Deloitte Consulting leaders Umbenhauer et al. (2018) suggested that organizations implement digital procurement strategies to demonstrate alignment with millennials' desires to stay abreast of the latest trends, including digitization and the Internet of Things (IoT). IoT is a notion of the connection of any electrical appliance or device to the Internet (Morgan, 2014). One procurement IoT application is the use

of tools such as Amazon's Alexa or Apple Computer's Siri to query customer and supplier information from a database (Maltaverne, 2017).

Additional solutions proposed to solve the talent shortage include the development of strong supervisors in procurement, and increased organizational investment in learning (Umbenhauer et al., 2018). Umbenhauer et al. (2018) also mention talent identification, focused staff engagement and skill optimization as other important elements to address the talent gap. Gravier (2017) implied that companies need to implement a talent development strategy inclusive of worker alignment with the firm's vision and message. In *Supply Chain Insights*, Cecere (2014) cited the importance of a greater emphasis on employee career planning and working to make supply chain planners feel valued as part of the talent development and retention strategy. She also proposes focused efforts by human resources in the areas of job design and talent development to fill the skill gap (Cecere, 2014). Harrington (2015) recommended expanded learning and development opportunities and an "employer of choice focus" (p. 11) to help companies retain staff and be "an attractive place to work" (p. 11). Clark (2016) suggested firms and universities collaborate to engage youth interest in supply chain careers to fill an early stage of the talent pipeline.

In summary, research highlights the impact of investment, staff engagement, job design, and leadership on talent development and retention. Digital transformation factors (Umbenhauer et al., 2018), engagement (Umbenhauer et al., 2018), leadership style (Ghasabeh, Reaiche, & Soosay, 2015), and the work environment (Harrington, 2015) all play an important role in developing and retaining talent. Firms that actively work to develop their procurement staff as a business practice will improve the company's overall performance by addressing the staff developmental needs. Alignment of personal values with a company's strategic vision, mission

and values will also aid employee development and company performance (Gravier, 2017; Kahn, 1990).

Problem Statement

Globally, procurement organizations face a shortage of well-trained individuals to execute their company's supply chain strategy (Umbenhauer et al., 2018). Exacerbating the global talent shortfall is a cross-industry demographic shift in the labor force (Arellano, 2015; Hollinger, 2018; Sullivan, Cooper, & Emberson, 2017). The shift compounds the talent gap in the procurement arena as knowledgeable baby boomers retire and less experienced millennials take their place at both the staff and managerial levels (Tuglan, 2016). Researchers also cite the importance of a varied approach to impact positively millennials sense of duty, organizational commitment, and employee engagement to enhance individual and business performance (Stewart, Oliver, Cravens & Oishi, 2017). The combination of less experienced employees who require a varied approach and a broader set of skills comes at a time when the demand for supply chain and procurement personnel outpaces supply (Harrington, 2015).

Because of the competitive nature of the industry, and the need for improved technical and soft skills, the pace of the development of the millennial generation must accelerate (Umbenhauer et al., 2018; Wowak, Craighead, Ketchen, & Hult, 2013). Digital transformation, including Artificial Intelligence (AI), big data, and dynamic inventory management are key change drivers (Strafford, 2018). Supply Chain Knowledge (SCK) is another important transformative factor, linking data and organizational learning to corporate operational performance (Wowak et al., 2013). Procurement leaders, therefore, must work actively to overcome the procurement skill gap inclusive of data, organizational learning and effective change management in support of their firm's supply chain strategy (Harrington, 2015). In

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summary, leadership and staff development are of paramount importance to procurement and supply chain operational performance.

There is a compendium of research that links organizational learning and operational performance to leadership style, emotional intelligence, and levels of employee engagement (Anitha, 2014; Harter, Schmidt, Asplund, Killham, & Agrawal, 2010). Multiple leadership factors correlate positively with staff development, job performance and employee engagement, including transformational leadership (Besieux, Baillien, Verbeke, & Euwema, 2015), and spiritual leadership (Wahid & Mustamil, 2017). Other research shows that leadership style and notably transformational leadership (TL), positively impact employee development, engagement, and retention (Sahu, Pathardikar, & Kumar, 2017). Wahid and Mustamil (2017) examined the effect of spiritual leadership on employee engagement and the triple bottom line of people, profits and planet. Their study concluded that businesses could boost engagement, employee development, and profitability through the adoption of models that consider the importance of emotions and spiritual beliefs. Supportive leadership also correlated positively to a higher level of employee engagement for employees that received a chance to refine existing skills and develop new skills in the workplace (Jin & McDonald, 2017). Conversely, leaders who allowed distractions, such as cell phone usage, to interfere with interactions with their staff, adversely impacted employee psychological meaningfulness, availability and their perception of job-related growth opportunities in the workplace (Roberts & David, 2017). In summary, company leaders should be mindful of their leadership style as they work to develop competent and well-rounded procurement talent.

Development of talented managers also has a positive impact on employee engagement and job performance (Harter, 2000). Therefore, organizations should consider the development

of managers as well as staff. Some literature characterizes supply chain managers as "drivers of revenue through innovation" (Billington & Jager, 2008, p. 26; Wowak et al., 2013, p. 866). Additional research shows that supervisory support is a significant factor affecting employee engagement and staff development (Jin & McDonald, 2017; Taneja, Sewell, & Odom, 2015; Volpone, Avery, & McKay, 2012). Priya and Vijayadurai (2014) stated that the relationship with managers influences employee engagement, an employee's willingness to learn, and can increase their intention to stay. Priya and Vijayadurai (2014) also characterized employee engagement as a measure of staff enthusiasm and emotional attachment to the job. They go on to state that engaged employees are fully involved and actively work to achieve the organization's objectives (Priya & Vijayadurai, 2014). Worker task, organizational and personal alignment with a company's values and goals are also employee engagement and development elements mentioned in research studies that can affect company performance (Alagaraja & Shuck, 2015; CEB, 2014).

Key psychological attributes of employee engagement (EE) include motivation, personality, cognitive ability, and social factors such as age and cultural identity, and the opportunity to develop and grow (Xu, Liu, & Chung, 2017). Employee outcomes and behaviors associated with employee engagement include job satisfaction, the perception of growth opportunities, Organizational citizenship behavior (OCB), value alignment and burnout (Rodrigues & Ferreira, 2015). In summary, employee engagement is an important employee developmental factor that leaders should consider when addressing procurement talent development.

Emotional intelligence (EI), personality, and learning approach are also predictors of levels of employee engagement according to Akhtar, Boustani, Tsivrikos, and Chamorro-

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Premuzic (2015). Goleman (1998) stated that EI is comprised of "self-awareness, self-regulation, motivation, empathy and social skills" (p. 95). Additional research shows these factors overlap with transformational leadership attributes and organizational learning (Ghasabeh et al., 2015). There is additional literature indicating EI is a key element of transformational leadership, leader effectiveness and team performance (McCleskey, 2014; Palmer, Walls, Burgess, & Stough, 2001). Other research indicates a correlation between EI and company profitability (Langhorn, 2004). In summary, EI is another important consideration in examining factors that influence procurement employee and leader development.

There are multiple assessments tools available with corresponding studies demonstrating the tools' validity and reliability in measuring the impact of employee engagement, emotional intelligence or leadership style on staff development. These tools include the Gallup Q12 survey (Harter, Schmidt, Asplund, & Killham, 2016), and the Institute of Employee Studies tool (Robinson, Perryman, & Hayday, 2004) for measuring employee engagement levels. Emotional intelligence tools include the Mayer-Salovey Caruso EI test (MSCEIT) (Brackett & Salovey, 2006), the EQ-i test (Bar-On, 2006), the Emotional and Social Competency Inventory (ESCI) (Goleman, 2018; Hay Group, 2011), and the Genos EI test (Palmer, Stough, Harmer, & Gignac, 2009). Transformational leadership measurement tools include the Multifactor Leadership Questionnaire (MLQ) (Bass & Avolio, 1994) and the Five Factor Personality Test (Goldberg, 1992). These research tools can help organizations to develop engaged, emotionally intelligent and savvy procurement employees and leaders.

Organizations have the opportunity to develop procurement staffers and leaders with the requisite skills by fostering employee engagement, emotional intelligence, and transformational leadership. Managing change is an additional performance factor for organizations to consider

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given the impact of digitization industry (Kotter, 1995). Companies who do not sufficiently

address talent development and change management challenges do so at the risk of impacted

financial and operational outcomes. The global nature of the supply chain requires leaders to

work effectively in multiple cultures and across business functions with a diverse set of

coworkers (Wowak et al., 2013). Therefore, EE, EI and leadership style are important success

factors.

Purpose of the Study

This phenomenological study examined the best practices employed by current

procurement leaders to develop procurement staff and to drive operational performance. Also,

the study examined the challenges faced by procurement managers, along with the measures

these leaders use to gauge the success of their staff development efforts. The information

generated in answer to the research questions, along with content from the literature review,

should yield insight into current leaders' perspectives and approaches. It should also provide a

foundation to inform staff development practices in procurement and supply chain management.

Therefore, this study could provide a springboard for additional talent development research

across multiple industries. Collectively, the above factors should provide insight to procurement

staff development during a time of a significant demographic shift in the global employee base.

The research questions below will aid in the examination of how today's procurement leaders

foster staff development in preparation for industry challenges and opportunities.

Research Questions

As part of the discovery process, this study examined the following questions:

RQ1: What strategies and practices do current procurement managers use to develop

employees?

RQ2: What challenges do procurement managers face in their efforts to develop

employees?

RQ3: How do procurement managers measure and track success in developing

employees?

RQ4: What recommendations would current procurement managers give the future

generations of procurement managers in developing employees?

Significance of the Study

World Gross Domestic Product (GDP) exceeded $75 trillion in 2016 according to data

from the World Bank (2016). An article in *Supply Chain Technology* magazine indicates that

organizational supply chains (Simpson, 2017) drive approximately half of the world's Gross

Domestic Product (GDP). A separate article from the *World Data Forum* indicates that global

GDP would increase by nearly 5% through the reduction of supply chain barriers (Moavenzadeh,

2013). Based on figures from the World Bank, the value of the global GDP increase due to the

reduction of supply chain barriers would equate to $3.78 trillion (World Bank, 2016). Noting the

information above, it is clear that the supply chain and supporting procurement activities impact

a significant portion of the world's GDP. The Deloitte study mentions that 78% of procurement

leaders surveyed rank cost reduction as a top business strategy for procurement leaders. Yet

51% of these same leaders do not believe their procurement team is capable of implementation

of their company's procurement initiatives (Umbenhauer et al., 2018). Procurement and related

supply chain management are vast areas with significant impact on individuals, companies, and

national economies. The findings of this study could help firms achieve improved procurement

and supply chain operations through refined staff development and retention techniques.

Procurement is a global, cross-functional discipline, touching companies in industries including automotive, retail, e-commerce, pharmaceuticals, technology, and consumer products (Pettey & van der Meulen, 2018). This study intended to offer readers real-world examples of best practices from working procurement managers supported by data gleaned from research on transformational leadership, employee engagement, emotional intelligence, change management, and related topics. The findings of this study could help practitioners to derive actionable steps and insights to help their organization implement positive change in the procurement department. Industry experts cite adaption to change as a crucial success factor for procurement endeavors (Degun, 2014; Umbenhauer et al., 2018).

Assumptions of the Study

This study makes the following assumptions:

1. Employee engagement, emotional intelligence, transformational leadership, and earlier supporting theories positively affect employee development, retention, and organizational performance. While the overwhelming majority of research studies examined support this assertion, others do not. Several studies question if EE, EL and TL theories correctly capture the cause and effect nature of the employee behavior. Some literature suggests positive bias concerning the impact of EE (Lawler, 2017). Even Goleman (2018) questioned the validity of the large body of work regarding EI. After examination of over 150 references including several meta-analyses, this study uses a framework that views increasing levels of EE, EL, and TL as positive and significantly improve employee development and business performance.

2. Psychological and physiological factors, including motivation, personality, and social factors, impact employee and leadership development and are worthy of consideration in developing conclusions and recommendations. Again, there is debate regarding the impact psychological and physiological factors but the research generally indicates that these elements are worthy of further examination in an analysis of talent development best practices.

3. Procurement managers and leaders make efforts to develop and to retain staff to meet organizational needs. These managers may or may not characterize their efforts as an attempt to foster employee engagement, emotional intelligence or transformational leadership. However, based on the literature reviewed to date, there appear to be sufficient parallels between manager best practices and these elements to draw parallels and conclusions.

4. The framework of this study builds on the assumption that procurement managers have a sense of talent development. It assumes they are aware of success factors and challenges. The writer also assumes these leaders can articulate their approach to staff development, engagement, and retention. Further, the author assumes that the procurement manager's use and can articulate relevant performance metrics employed in the development of staff and future leaders.

Limitations of Phenomenological Research

This research study is qualitative in nature and descriptive. The researcher chose a phenomenological approach to characterize procurement manager descriptions of their efforts to engage and develop employees. As with any personal recount of endeavors, there is an inherent bias that may result. Managers will likely leave out some important details or challenges faced

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deliberately or inadvertently. Researcher bias is also likely to some extent, given the author's existing perspective on procurement talent development.

Other limitations of this study include:

1. The vast majority of procurement managers interviewed are from the Southern California region of the United States. It is conceivable that a regional or national bias may result.

2. External factors may also influence participant perspectives, including political, economic, social, technological, environmental or legal issues in the near term that may not exist over time. Current global trade challenges and tariffs may lead to a near-term perspective that is biased. Generational differences in response to digitization may skew some perspectives. Historical context may also skew the responses in light of prevailing attitudes during the era of the study.

3. It is also conceivable that an industry bias may result if the majority of subjects are from the same company or industry. The researcher made the effort to diversify sources but it is still possible an industry bias prevailed.

4. A different qualitative, mixed method or quantitative approach might lead to varied conclusions and recommendations for the same sample of procurement managers.

Definition of Key Terms

This dissertation focuses on talent development best practices for procurement staff and as a result, uses terminology that may not be generally familiar. In addition, some terms have multiple meanings and are used interchangeably. The definition of select key terms appears below to add clarity to the concepts as discussed in this study.

Digital procurement. "The proliferation of digital tools and applications…such as artificial intelligence, robotics, and block chain…connecting all parts of the supply chain…applying advanced analytical capabilities to enhance performance." (Umbenhauer et al., 2018, p. 5).

Emotional intelligence. Salovey and Mayer (1990) wrote that "emotional intelligence is a form of social intelligence that involves the ability to monitor one's own and others' feelings and emotions, to discriminate among them, and to use this information to guide one's thinking and action" (p. 189). Goleman (1998) offers a comparable characterization comprised of five components to define emotional intelligence: "self-awareness, self-regulation, motivation, empathy, and social skills" (p. 95).

Employee engagement. While the topic is robust, with many authors writing on the subject, and an implied positive relationship between employee engagement and desirable business outcomes, no consensus exists on the precise definition of employee engagement (Bakker & Leiter, 2010). In this study on procurement talent development, employee engagement is the degree to which an employee feels emotionally safe to behave in an authentic manner, are physiologically available to perform at work, and find personal congruence and meaningfulness in the job, to execute work-related tasks in support of organizational values and goals (Kahn, 1990). The examination of literature in Chapter 2 will provide the reader with additional information on the history, evolution, and definition of the employee engagement concept.

Internet of things. The interconnection through the Internet of electrical appliances and devices embedded in the material, equipment, and everyday objects that allows them to send and receive data.

Logistics. The process and activities surrounding the transportation and storage of materials and finished goods from suppliers and to customers.

Procurement vs. purchasing. "Procurement deals with the sourcing activities, negotiation and strategic selection of goods and services to support an organization's business objectives. Purchasing is the process of how good and services are ordered" (Lim, 2017, last para.). Some organizations do not differentiate between procurement and purchasing (Schindler, 2016). For the purposes of this study, the terms are interchangeable.

Supply chain. Supply chain is a broad term inclusive of procurement, inbound and outbound logistics, and sourcing (Christopher, 2016). Strong interrelationships with both customers and suppliers help to deliver value to all parties involved in their mutual supply chain. The goal is to deliver and capture value throughout the process. (Christopher, 2016).

Transformational leadership. Bass and Avolio (1994) defined transformational leadership as "idealized influence, individual consideration, inspirational motivation, and intellectual stimulation" (p. 112). Idealized influence is for leaders who lead by example, placing organizational, ethical, moral, and team developmental considerations over personal benefits. Individual consideration is leaders who deal with each subordinate or follower according to the person's unique values, goals, and needs. Inspirational motivation is when leaders provide a compelling vision within the organizational context, through clear expectations of goals, combined with enthusiasm and zeal. Intellectual stimulation is when leaders solicit innovation, creativity and new approaches to problem-solving from teams.

Organization of the Study

There are five chapters in this study. Chapter 1 is an introduction to the current state of affairs in the supply chain industry in reference to talent development and availability. Chapter 1

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also contains a preview highlighting the potential impact that employee engagement, emotional intelligence and transformational leadership can have on staff and leadership development efforts. In addition, the chapter contains the problem statement, the purpose of the study, and the research questions. The significance of the study, and key assumptions, definitions and limitations are also discussed in Chapter 1. Chapter 2 contains a literature review on employee engagement, emotional intelligence, and transformational leadership, including its history, definitions, and elements. Chapter 2 also outlines popular tools used to measure the outcomes and effectiveness of these employee engagement, emotional intelligence and transformational leadership. Chapter 3 encompasses a discussion on the research methods of this study, including the research design, interview protocol, and statement of personal bias. Chapter 4 includes the findings of the study, general information on the participants, and the data collection process and results. Chapter 5 discusses the author's conclusions and recommendations, inclusive of suggestions for future research.

Summary

An effective procurement organization is an essential ingredient to operational and financial success for many companies and nations around the globe. Estimates vary, but there is general agreement that procurement has a significant impact on the GDP of the global economy. Yet, despite the global importance of procurement, there is a shortage of competent personnel to fill the demand. The shortage stems from the increased demand for staff, a shortage of supply chain instructors, and the need to improve talent development approaches within some organizations. In addition, the requirements of the procurement function are changing. Globalization, digital procurement, and the Internet of Things are accelerating the pace of change. Further exacerbating the shortage in qualified personnel is the ongoing retirement of the

experienced baby boomer generation with replacement by the less experienced millennial generation.

Developing employees by leveraging employee engagement, emotional intelligence, and transformational leadership should help companies to close the talent gap in the discipline. (Umbenhauer et al., 2018). In order to discern current best practices employed to develop procurement talent, Chapter 1 proposes an analysis of interview data from current leaders through four research questions. These questions focus on the methods and success measures current procurement leaders deploy to develop employees. An examination of challenges to developing employees also occurs. The interviews of these procurement leaders should yield insight into the nuances of their staff development approach, and their collective best practices. These procurement leaders will also offer recommendations to future generations of procurement managers on favored approaches to employee development.

Through careful examination of peer-reviewed literature on employee engagement, emotional intelligence, and transformational leadership in conjunction with the interview data, the researcher drew conclusions on procurement staff development best practices from the research. The researcher also states herein the assumptions and limitations of the research approach and recommendations. The researcher also defines important terms, and provides an overview of the organization of the study.

Chapter 2: Literature Review

This chapter examines employee engagement, emotional intelligence and transformational leadership literature, including definitions, history, and related elements. This chapter also reviews research-validated tools used to measure the outcomes and effectiveness of employee engagement, emotional intelligence, and transformational leadership efforts and behaviors. This chapter concludes with a summary discussing the relationship between employee engagement, emotional intelligence, and transformational leadership and their impact on procurement staff development according to literature. These concepts informed the research with procurement managers to glean insight into their talent development best practices.

Employee Engagement: Introduction

Personal engagement and disengagement at work initiated the employee engagement concept beginning with the seminal work of Kahn in 1990 (Welbourne, 2015; Wollard & Shuck, 2011). In his article, Kahn (1990) discussed the idea that employees are psychologically present to varying degrees, expressing their authentic self in their work roles with a presumed impact on performance (Bailey, Madden, Alfes, & Fletcher, 2017). Kahn's 1990 article on work roles "describes and illustrates three psychological conditions – meaningfulness, safety, and availability" (Kahn, 1990, p. 692). Kahn further tied these psychological conditions to theories existing at that time – job involvement, commitment to the organization, and alienation at work (Kahn, 1990). Since Kahn's initial work, hundreds of peer-reviewed articles have built further upon the employee engagement notion (Popli & Rizvi, 2016; Xu, Liu, & Chung, 2017).

Significant literature ties employee engagement to psychological factors and theories (Eldor & Vigoda-Gadot, 2017; Gagné & Deci, 2005), and employee outcomes (Harter, Schmidt, & Hayes, 2002; Kasekende, 2017). Other literature highlights measurement tools (Harter et al.,

2016; Rajagopal & Abraham, 2007), and models (Bersin, 2015; Schaufeli, Bakker, & Salanova, 2006). Additional literature discusses organizational culture (Baggetta, Han, & Andrews, 2013; Taneja et al., 2015), leadership style (Jin & McDonald, 2017; Whorton, 2014), and ultimately, organizational performance (Harter et al., 2010). While the topic is broad, with many authors writing on the subject, there is little agreement on the precise definition of employee engagement (Bakker & Leiter, 2010). This document provides the reader with history, evolution, and current thought on the employee engagement topic with cross-references to the impact in the procurement discipline.

The definition of employee engagement varies in the literature with competing explanations from consultants and academics (Warner, 2018). A review of several of these definitions appears in this section. Kahn's initial construct defined personal engagement in work role performance as "meaningfulness, safety, and availability" (Kahn, 1990, p. 692). Meaningfulness refers to an individual's sense of value in the work; safety refers to the freedom to be authentic in the work without fear of negative consequences; availability refers to the employee's sense of capacity to invest in the job role (Kahn, 1990). Buckingham and Coffman (1999) further defined employee engagement based on research from the Gallup Corporation. In their book, *First, Break all the Rules,* (Buckingham & Coffman, 1999), the authors focused on the role of managers as leaders striving to make their business units more effective through employee engagement. Coffman and Gonzalez-Molina (2002) defined employee engagement as a combination of how a staff thinks and feels about the work and the organization, leading to a growth in profits if the notions are positive. Most definitions imply that employee engagement is a positive outcome that is desirable (Macey & Schneider, 2008). Wollard and Shuck (2011) define employee engagement as "an individual employee's cognitive, emotional and behavioral

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state directed toward desired organizational outcomes" (p. 429). President and CEO of Red Hat, Inc., Jim Whitehurst defines employee engagement as "getting people to believe what you want them to believe" (Hollon, 2012, para. 6). Kruse (2012) writes, "Employee engagement is the emotional commitment the employee has to the organization and its goals" (para. 3). Other definitions stress greater identification with the employer or job role or use different words and phrases such as vigor, absorption, passion, and commitment to the organization to codify a definition (McBain, 2006; O'Byrne, 2013). Kelly and Murphy (2015) define employee engagement as an alignment between a worker's personal goals and the vision and goals of their employer.

Employee Engagement: History and Evolution

The concept of employee engagement evolved over time. Following is a brief history broken into periods using the work of O'Byrne (2013) as a guideline. While there are other historical depictions as well, the O'Byrne (2013) description presented a reasonable framework that is representative of the evolution of employee engagement. The article characterizes the 1970-1990 timeframe as the employee satisfaction era. The 1990-2000 timeframe is the employee commitment era. The 2000-2010 timeframe is the employee engagement era. Finally, 2010-present is the sustainable engagement era.

One shortcoming of O'Byrne's (2013) approach is that his original framework limits the discussion to a period beginning in the 1970s. Note that George Gallup began his worldwide study of human needs and satisfaction in the workplace in the 1930's (Harter et al., 2010). In addition, Maslow's work regarding an individual's need for self-fulfillment and actualization was pre-1970 (Maslow, 1943; Maslow 1954). In his work, Maslow crystalized the concept of need

fulfillment and personal involvement in work and other activities (Maslow, 1943). Current

literature includes references to the work of Gallup, Maslow and others predating 1970 (Harter

et al., 2016) as foundational to later research on job involvement, job design, organizational

commitment and, ultimately, employee engagement. Therefore, a modification to O'Byrne's

(2013) framework occurred, to include also the work of Gallup & Hill (1960), Maslow (1943),

and other theorists who wrote prior to 1970. With the modification to O'Byrne's approach as

noted above, a description of each employee engagement era and references to representative

literature from that period appear below.

Pre-1990 (employee satisfaction era). With the modification to the periods noted

above, the *History of Employee Engagement* article, O'Byrne (2013) characterized the 1970-

1990 period as the employee satisfaction era. The antecedents to employee engagement from the

employee satisfaction era include intrinsic motivation (Deci, 1975), job involvement (Jones,

James, & Bruni, 1975) and work design (Hackman & Oldham, 1980). Additional constructs

from this era include Quality of Work Life (QWL; Lawler & Ledford, 1981), self-management

(Hackman, 1986), job characteristics (Fried & Ferris, 1987), and organizational commitment

(Mathieu & Zajac, 1990).

Deci (1975) focused on intrinsic motivation defined as initiating an activity out of

personal interest or fulfillment. Individuals engage in intrinsically motivated behaviors to derive

satisfaction and a sense of self-determination from actions within an environment, such as a

workplace. A sense of role competence is also a consideration in evaluating intrinsic fulfillment

(Deci, 1975). Ryan and Deci (2000) expanded upon the intrinsic motivation idea with the self-

determination theory (SDT). SDT examines both intrinsic and extrinsic motivational factors.

SDT also discusses the process through which extrinsically motivated behaviors might become

internalized and thereby intrinsic. According to SDT, the primary intrinsic drivers of behavior

are competence, autonomy, and psychological relatedness. One question from their work is how

to leverage external factors to drive intrinsic motivation (Ryan & Deci, 2000).

Jones et al. (1975) contributed to the employee engagement lineage through examination

of how a worker's perception of a leader impact job-involvement. The study found that high

job-involvement employees had a lower correlation between trust, confidence, and perception of

a leader's traits than low job-involvement employees did. The Jones et al. (1975) study also

concluded that an individual's characteristics require examination to draw conclusions that are

more accurate on how a leader's behavior influences employee job-involvement.

Hackman and Oldham (1980) examined the impact of work design on employee

motivation. Their research resulted in the Job Characteristics Model (JCM) (Hackman &

Oldham, 1980). This model indicates that five job characteristics, "skill variety, task identity,

task significance, autonomy, and job feedback are the keys to predicting employee job

satisfaction and work performance" (Steyn & Vawda, 2014, p. 281). These characteristics can

also inform job design to increase employee motivation. A follow-on study continued their

discussion on work design, by examining the effectiveness of self-managing units, including

factors contributing to the personal well-being and the achievement of organizational objectives

(Hackman, 1986).

Fried and Ferris (1987) assessed the validity of the JCM through examination of about

200 studies of the model and application of a meta-analysis to a portion of the data. Their results

found a correlation between job characteristics and both psychological and behavioral outcomes,

and in particular an individual's desire to grow. Thus, the Fried and Ferris (1987) study in effect

validated the JCM. Fried and Ferris (1987) also stated that job design efforts should consider

employee characteristics, to improve the overall effectiveness of the design approach. In summary, the JCM found job design could affect employee performance and job enrichment.

Quality of Work Life (QWL) is a multi-dimensional theory that focuses on an employee's work as a component of their overall life and methods through which a company may focus on an employee as a whole being (Ronchi, 1981). Lawler and Ledford (1981) examined the connection between increased productivity and improved QWL. Their work indicates that a clear definition of productivity is an important consideration in QWL program design. Their writing also indicates QWL programs should perform an analysis to determine specific employee characteristics associated with improved productivity. Factors that may influence productivity include employee gain-sharing plans, and problem-solving groups (Lawler & Ledford, 1981).

Mathieu and Zajac (1990) noted that researchers considered organizational commitment (OC) as predictive for employee behaviors such as absenteeism, turnover, performance, and involvement. In their research, Mathieu and Zajac (1990) conducted 48 meta-analyses, covering 26 OC antecedent variables with eight outcomes. Antecedents included demographic factors, tenure, ability, salary, skill, job level, group-leader relations, and organizational characteristics. Outcomes included job performance ratings, attendance, punctuality, perceived job alternatives and turnover (Mathieu & Zajac, 1990). In summary, Mathieu and Zajac (1990) found multiple forms of OC that yielded varied impact on OC. Of the various forms of OC, attitudinal definitions were more predictive of engagement than behavioral forms of OC. In recap, the employee satisfaction era saw the emergence of constructs such as work design, Self-Determination Theory (SDT), Quality of Work Life (QWL), Organizational Commitment (OC) and the Job Characteristics Model (JCM). These frameworks examined the impact of job

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environmental and design factors results such as organizational commitment, job involvement, job satisfaction, and employee motivation. The era also saw research highlighting the importance of personal, job role competency, and intrinsic motivation considerations in job characteristics and work design.

1990–2000 (employee commitment era). O'Byrne (2013) characterized the 1990-2000 timeframe as the employee commitment era. This period saw the emergence of the employee engagement archetype in writing on "personal engagement and disengagement" (Kahn, 1990, p. 692). There was also further examination of "organizational commitment" (Meyer & Allen, 1991, p. 61), and work on the definition of employee engagement (Priya & Vijayadurai, 2014). Research on employee empowerment (Wilkinson, 1998), and the employee satisfaction customer service value-chain (Barber, Hayday, & Bevan, 1999; Rucci, Kirn, & Quinn, 1998) occurred as well. Publication of SDT research and investigation of intrinsic motivation also continued (Ryan & Deci, 2000).

In his seminal work on personal engagement and disengagement, Kahn (1990) moved away from the job design and model-oriented focus of the former era and examined the opportunity for employees to personally engage or disengage their authentic self in the work environment (Kahn, 1990). Most agree that the genesis of employee engagement occurred in the work of Kahn in 1990 (O'Byrne, 2013; Welbourne, 2015; Wollard & Shuck, 2011) although the phrase employee engagement does not appear in the piece (Kahn, 1990). In his article, Kahn (1990) discussed the idea that employees are psychologically present to varying degrees, expressing their persons in their work roles with a presumed impact on performance (Bailey, et al., 2017). Kahn's initial construct characterized three psychological states affecting engagement – meaningfulness, safety, and availability (Kahn, 1990). Kahn's research examined engagement

at an architectural firm, and a summer camp to test his hypothesis in dissimilar environments. Kahn concluded that the ability to engage one's authentic self at work made the job more rewarding and fulfilling. In short, engagement was about bringing one's unique skills and interests to the job.

In 1993, Schmidt et al. offered a blended definition of job satisfaction and employee engagement appeared as "an employee's involvement with, commitment to, and satisfaction with work. Employee engagement is a part of employee retention" (Priya & Vijayadurai, 2014, p.6). Schmidt's description blends earlier notions on job satisfaction (Hackman & Oldham, 1980) and organizational commitment (Meyer & Allen, 1991). Schmidt's work builds upon data from the Gallup Group (Harter et al., 2002). Academics and business professionals still wrestle with the precise definition of employee engagement to this day (Warner, 2018).

Meyer and Allen (1991) examined organizational commitment and defined three separate components including a desire (emotionally based), a need (sustainability based) and an obligation (values based). Their definition was an effort to provide structure for additional research and to integrate existing research into an outline (Meyer & Allen, 1991). Affective commitment includes an employee's characteristics and work experiences, and the job-related and organizational structure characteristics. Continuance commitment considers the cost to the individual associated with leaving an organization. Normative commitment reflects the sense of obligation an employee may feel to an organization (Meyer & Allen, 1991). Meyer and Allen's (1991) research relates these commitment factors to turnover, organizational tenure, performance, and involvement.

Similar to employee engagement, the definition of empowerment varies although it was a part of a common managerial conversation around engagement in the 1990's (Wilkinson, 1998).

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Empowerment in this era focused on task behavior and employee attitudes. Managers were to trust and empower employees to take charge of company initiatives (Wilkinson, 1998). In another similarity to employee engagement, empowerment has roots in psychological research of Deci (1975), Herzberg (1964, 1968), Maslow (1943) and (Wilkinson, 1998). Employee empowerment increases job satisfaction and reduces turnover, in part by aligning staff with organizational goals (Wilkinson, 1998). Intrinsic motivators including nature of the work, opportunities for growth, and job status are factors in empowerment (Wilkinson, 1998).

Examination of the effect of employee satisfaction on the customer service value-chain occurred in this empowered and engaged era as well. In the Rucci et al. (1998) article the authors held that the foundation for superior financial performance was creating a compelling work environment inclusive of the opportunity for personal growth and development, support for ideas and creativity, and an empowered workforce. The discourse went on to characterize employee behavior as an outgrowth of employee feelings about the job and the company. Employee feelings about the job and company had a greater impact on behavior than empowerment and growth opportunities (Rucci et al., 1998). The research of Barber et al. (1999) for the Institute for Employment Studies (IES) went further in the examination of the service-profit chain through an empirical test on data from 65,000 employees and 25,000 customers from about 100 individual stores. The data indicated a solid connection between employee satisfaction, customer satisfaction and an increased level of store sales. Employee commitment, in particular, directly affected staff absenteeism and store sales. Organizational culture and good line management also correlated positively to store employee commitment and store sales.

Relevant psychological research into SDT and intrinsic motivation to impact employee performance also continued (Ryan & Deci, 2000). Self-determination aligned more closely with employee interest, enjoyment, and satisfaction. Job congruence and synthesis with values were also pertinent self-determination factors. SDT assumes that human beings seek self-integration and motivation with tasks, but are also vulnerable to passivity. SDT theorizes that when managers attend to and support staff basic psychological needs, engagement is easier to facilitate.

2000–2010 (Employee engagement era). O'Byrne (2013) characterized the 1990-2000 timeframe as the employee engagement era. This period saw several influential employee engagement publications from Gallup, Inc., and affiliates including the work of Buckingham and Coffman (1999); Buckingham and Clifton (2001); Harter et al., (2002); and Harter et al., (2010). Other works reviewed from this period are from Ferrer and McWilliams (2006); Parkes and Langford (2007); van Riel, Berens, and Dijkstra (2007); and Romanou et al. (2010). Rajagopal and Abraham (2007), researched the Institute of Employee Studies (IES) tool to measure employee engagement. A review of these works appears below.

One important publication from Gallup is the work of Buckingham and Coffman (1999). In their book, *First, Break all the Rules* subtitled *What the World's Greatest Managers Do Differently* (Buckingham & Coffman, 1999) the author's leveraged Gallup data from over 80,000 interviews with managers over a twenty-five-year period. Since the book's publication, Gallup measured employee engagement for over 30 million employees globally (Harter et al., 2010). The studies originated with the work of Dr. Donald O. Clifton, regarded by the American Psychological Association (APA) as the founder of strengths-based mental research, and the grandfather of positive psychology (American Psychological Association, 2003). The book

crystallizes the science to support Kahn's engagement concept. In the forward, Gallup's Chief

Scientist for Workplace Management and Well-Being surmises that engaged workers have

managers who develop their strengths rather than focusing on their weaknesses (Gallup Press,

2016). The book also highlights the use of 12 questions, later known as the Gallup Q^{12} survey,

as a tool to measure employee engagement.

In a corollary to *First Break all the Rules*, Buckingham and former Gallup CEO Dr.

Donald O. Clifton wrote *Now, Discover Your Strengths* (Buckingham & Clifton, 2001). The

premise of the book based on Gallup's research is that successful people tend to focus on their

strengths instead of their weaknesses. The book categorizes 34 strengths and notes that

individuals should further develop their strengths while simply managing their weaknesses. The

book goes on to talk about team development building on an individual's strengths, lining up the

right person for the right job role (Buckingham & Clifton, 2001). The book ties into Harter's

statement regarding the engaged manager is focusing on strengths (Gallup Press, 2016).

Harter et al. (2002) reviewed the organizational structure alignment that occurs across the

dimensions of employee satisfaction, employee engagement, and business outcomes. The data

were from 36 companies comprised of 7.939 business units. While many previous studies

focused on the individual as the unit of analysis, the Harter et al. (2002) study used the business

unit as the unit of analysis. The study concluded that employee engagement and satisfaction

have substantial implications at the business unit level. The authors stressed the business unit

was worthy of managerial attention. The study also concluded management decisions influence

both engagement and employee satisfaction. The study suggested further longitudinal research

to uncover the impact on employee engagement of managerial decisions over time.

The Harter et al. (2010) team performed additional research on employee engagement at both the individual and business unit level on behalf of Gallup. Using a longitudinal database that included 10 organizations and 2,178 business units Harter et al. (2010) concluded, "Managerial actions and practices can impact employee work conditions and employee perceptions these conditions" (p. 378), leading to improved organizational outcomes if perceptions are positive. The research leveraged the Gallup Q^{12} instrument to uncover which work conditions fostered the highest level of employee engagement, with practical advice on management practices. The article described both the independent variables from the Q12 instruments and the dependent variables of "financial performance, employee retention, and customer loyalty" (Harter et al., 2010, p. 385). Meta-analysis was the statistical approach employed. "Customer loyalty, employee retention, revenue, sales, and profit" (Harter et al., 2010, p. 378) were found to correlate with employee attitudes and perceptions of work conditions, but the research into the direction of causality was inconclusive.

Ferrer and McWilliams (2006), studied employee engagement among academics viewing engagement as a reciprocal arrangement between employees and their employer. This qualitative study put forth that the employee will engage at work and thereby exhibit organizational citizenship behavior (OCB) in response extrinsic motivators and tactics from the employer. The Ferrer and McWilliams' (2006) study indicated the need for further research to better model the level of reciprocity beyond a largely transactional relationship.

Parkes and Langford (2006), compared employee engagement in the not-for-profit and commercial sectors regarding human resource management practices. Their quantitative study reviewed survey results from 1,159 employees from 53 non-profit and 53 commercial organizations. Their research found similar levels of employee engagement for staffers from

both groups. Personal congruence with organizational mission, vision and values were important factors for engagement in both sectors. A sense of alignment with organizational purpose, participation in the organization and personal progress were factors driving employee passion in both groups (Parkes & Langford, 2006).

van Riel, Berens, and Dijkstra (2007) observed how firms can stimulate strategically aligned behavior among employees. In their quantitative study, the authors examined three organizations and the firm's efforts to motivate, inform, and provide the necessary training to employees so individuals may align with the company's strategy. Their results indicated motivating and developing capabilities yield best results when employees are aware of the firm's strategy.

Rajagopal and Abraham (2007) conducted a quantitative study to measure employee engagement. This study used a diagnostic tool developed by the Institute of Employee Studies (IES) to determine drivers of employee engagement from survey data. The IES engagement model highlights the link between feeling valued, involved, and engaged. The model examines engagement drivers including the impact of immediate management, training, career development, health and safety, communication, job satisfaction, and other factors. For this study, the data were from a survey of 108 respondents from an Indian oil refinery. Like other quantitative studies, the introduction and literature review provided the necessary context. The authors used both descriptive statistics and regression analysis to characterize the data. The drivers above were statistically significant in their impact on employee engagement.

Romanou et al. (2010) examined the impact of manager engagement levels on employee engagement. Their qualitative study explored managerial engagement levels at a firm and determined that engaged manager could identify factors limiting employee engagement in staff.

Given the necessary resources, the study concludes, managers may be able to improve critical elements of employee engagement.

Based on the research above, the employee engagement era saw the development of multiple tools and scientific approaches to measuring engagement. The two tools outlined above, the Gallup Q^{12} and the IES survey, represent an effort to break employee engagement into key drivers for measurement. Both tools use data from global sources and have a measure of consistency across industries. Moreover, there is significant documentation examining the use of both tools across multiple studies (Buckingham & Coffman, 1999; Rajagopal & Abraham, 2007). Still, Lawler (2017), who published research on the impact of employee attitude on performance since the 1970s, questions what value employee engagement surveys add beyond traditional attitude surveys that existed for decades before the employee engagement era.

2010–present (sustainable engagement era). O'Byrne (2013) characterized the 2010-present timeframe as the sustainable engagement era. The writings of Shimazu, Schaufeli, Miyanaka, and Iwata (2010); Kennedy, Krahn, and Krogman (2013); Hazelton (2014); and Naujokaitiene, Tereseviciene, and Zydziunaite (2015) are representative of works from this present era. Popli and Rizvi (2016); Sivapragasam and Raya (2017); and Xu et al. (2017) also published during this timeframe. Discussion of all of these articles appears below. These authors looked at various tools and methods of measuring and fostering employee engagement. The authors also examined drivers of employee engagement.

Shimazu et al. (2010) examined the application of the employee well-being and employee engagement constructs to a Japanese population using the Utrecht Work Engagement Scale. Their study explored both Japanese and the Dutch versions of the Utrecht Work Engagement Scale for accuracy. Data consisted of 2,339 surveys from Japan and 13,406 surveys from the

Netherlands. "The Japanese version had difficulty in differentiating respondents with extremely low work engagement whereas the Dutch version had difficulty in differentiating respondents with high work engagement" (Shimazu et al., 2010, p. 1). The researchers implied that cultural mores had an impact on the results. For this reason, the authors encourage a level of caution when "interpreting low-engagement scores among the Japanese as well as high engagement scores among staffers from western nations" (Shimazu et al., 2010, p. 1).

Kennedy et al. (2013) examined motivations and quality of life concerns resulting in downshifting. Downshifting refers to employees working less because of lifestyle concerns, that is, reduced their income, and increased their leisure time" (Kennedy et al., 2013, p. 773). This downshifting approach was examined as a possible individual-level solution to reduce stress from long working hours and work intensification, to help staff maintain the quality of life, and to foster civic engagement. The research used a *t*-test and a *Chi-squared* test for the statistical analysis. Reduced working hours was the independent variable. The authors created indices to measure the dependent variables quality of life and pro-environment behaviors. Downshifting was found to have a nonsignificant impact on the quality of life.

Hazelton (2014) stated that positive emotions boost employee engagement. She also concluded that a fun work environment could foster both individual and organizational success. Her article discussed the importance of harnessing positive emotions to engage, empower, and unleash energy on the part of the staff. She considered the work environment to be a vital element in driving organizational outcomes and events. Hazelton (2014) also recommended it is useful to further study the impact of positive emotions on work outcomes. Furthermore, the article highlights the importance of concerted effort to generate significant amounts of positive

emotions at work – at least three to one – over negative emotions, given their importance and our inability to engage other stress relieving behaviors in a professional environment.

Naujokaitiene et al. (2015) examined the best form of support to foster employee engagement with Technology-Enhanced Learning (TEL) in staff skill and competency development. Note that engagement in this context implies interaction as opposed to the full engagement of one's authentic self. The article described a mixed methods study, using both a quantitative and case study methodology for the research. Technology-Enhanced Learning and the Technology Acceptance Model (TAM) informed the survey design. The survey tool was used to collect data from 75 employees in answer to 15 statements. The validation of the survey tool occurred in a previous study. The tool also had a high Cronbach's alpha for every section. The study concluded that employees will get more involved in TEL if managers and colleagues support their efforts. Infrastructure and institutional policy support are slightly less related to engagement than support from managers and colleagues (Naujokaitiene et al., 2015).

Popli and Rizvi (2016) used a quantitative research approach to study the drivers of employee engagement and in particular the impact of leadership style. The study examined data collected from 340 employees from five service-based corporations in Delhi, India. Notable in this research article was the use of mature and widely used survey instruments for employee engagement (E3 – Development Dimensions International) and leadership style (Multi-factor Leadership Questionnaire MLQ-5X Short Rater Form.) Both instruments had high validity and reliability established from previous studies. Dependent and independent variables, correlations, significance, and other statistical information appeared prominently in the article. The results indicated a significant relationship between employee engagement and the style of the leader (Popli & Rizvi, 2016).

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Sivapragasam and Raya (2017) surveyed the link between Human Resource Management (HRM) and employee engagement. The authors surveyed 626 knowledge professionals working in IT companies in Chennai City in India with a five-item Human Resource Management practices scale using the Likert method. "The study found a statistically significant relationship between HRM practices and employee-level outcomes such as perceived efficacy, engagement and employee well-being, where employee well-being plays a mediating role" (Sivapragasam & Raya, 2017, p. 147). "The implications of the findings of the theory and practice of HRM" suggest firms should continue to focus on employee-related goals instead of short-term financial gain (Sivapragasam & Raya, 2017, p.147).

Employee Engagement: Elements

There is conflicting thought on the precise definition of employee engagement, its antecedents, correlating factors and causes (Bakker & Leiter, 2010). The full breadth of the debate surrounding these aspects of employee engagement is beyond the scope of this literature review. However, this portion of the review will highlight influences cited in research to correlate with employee engagement along with tools used to measure the construct. The author segments these influences as motivation, authenticity, and organizational factors. Tools reviewed include the aforementioned Gallup Q12 and IES surveys, the Utrecht Worker Engagement Survey, and the Job Engagement Survey, in addition to others. Both the influences and tools are rooted in psychology and behavioral science as discussed in the paragraphs below.

Meaningfulness (motivation). Citation of several well-known theories on motivation occurs in the literature on employee engagement. In his writing on engagement, Kahn (1990) cites theories from Maslow (1943), Deci (1975) and Hackman and Oldham (1980) in his work. Hackman and Oldham (1980) in writing about job design cite Scott (1966), Herzberg (1968),

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Lawler (1973), and Deci (1975) in their work. These author's theories and other relevant psychological concepts appear throughout the literature. For discussion purposes, this section will examine Maslow's (1943) hierarchy of needs, and Scott's (1966) comments on Activation Theory. This section will also examine Deci (1975) on intrinsic motivation and Ryan and Deci (2000) on Self-Determination Theory.

Activation Theory developed from neurological studies on brain function and stimulation. Scott (1966) postulated that simulation of the brain centers of pleasure or punishment impacts the degree of activation of a person. The degree of activation is an important element in understanding behavior, according to Scott (1966). Scott (1966) remarked that the variation, intensity, and novelty of simulation are variables influencing activation levels. Other elements submitted were stimulus complexity, meaningfulness, and degree of uncertainty. Scott tied activation to motivation in his work.

Maslow's (1943) Hierarchy of Needs Theory began with a reexamination of Instinct Theory. Maslow postulated that humans are more autonomous and independent than instinct theory allows. In summary, animal instinct was not a sufficient paradigm to characterize human psychology (Maslow, 1943). Eventually, Maslow theorized five levels of human needs, building from physiological to safety, to love and belonging, esteem, and ultimately, self-actualization. Kahn (1990) tied the meaningfulness aspect of his theory on personal engagement and disengagement to an employee's psychological need for self-expression and meaning in work and life. He based this tie in on Maslow's work on motivation and personality (Kahn, 1990). In research on empowerment, Wilkinson (1998) noted that the construct involved employees taking ownership for their work and its outcomes. Wilkinson tied in Maslow and the work of Herzberg (1968), theorizing that allowing employees to take responsibility for their work would in part

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foster self-actualization through feeding intrinsic motivation and role performance (Wilkinson, 1998). Jerome (2013) suggested the workplace is an ecosystem where Maslow's hierarchy can be a guiding principle in organizational culture.

Internal urges drive intrinsic motivation (Deci, 1975). These urges cause people to behave in a particular manner because it is naturally fulfilling. It is an innate quality. Individuals act out of enjoyment or a desire to actualize their potential (Deci, 1975). Intrinsically motivated activities reward in the doing. Such motivators and behaviors increase individual feelings of competence and self-determination (Deci, 1975). Deci's theory focused on presenting a cognitive perspective on motivation – the why behind motivation. Deci's work built on previous psychologist conceptualizations of intrinsic motivation (Deci, 1975). Human's motivation for mastery stems from self-determination and actualization. This need develops differently for each based on the differentiation of experiences and drivers experienced across a population (Deci, 1975). Role competence may be a driver or hurt motivation depending upon the individual and situation. Role competence was also a factor in Kahn's (1990) examination of personal engagement. Kahn (1990) characterized personal engagement as having the element of intrinsic motivation. The worker draws psychological fulfillment from executing the task if aligned with the individual's authentic self. Humans "self-express" through personal voice, emotions, creativity, and ethics (Kahn, 1990). Our intrinsic motivations foster self-expression.

Ryan and Deci (2000) developed the Self-Determination Theory (SDT) and the General Causality Orientations Scale (GCOS) to measure the degree of self-determination behavior. Deci's foundational work on intrinsic motivation led to the development of self-determination theory. The GCOS tool measures three causal orientations – autonomy, control and impersonal to predict emotional, intellectual and behavioral factors. These orientations are an aspect of self-

determination theory, which organizes around intrinsic and extrinsic motivators. SDT postulates people have intrinsic tendencies driving them toward healthy behaviors (Ryan & Deci, 2000). SDT also postulates that internalization of extrinsic motivators may occur if an autonomous individual deems them congruent with existing intrinsic motivations (Ryan & Deci, 2000). Environmental factors fostering autonomy, competence, and relatedness may leverage natural intrinsic motivation to drive behaviors toward desirable outcomes. Kahn's (1990) work theorized that an intrinsically motivated individual would drive energy into physical, cognitive and emotional activities – including at work.

Reciprocity. Ferrer and McWilliams (2006) noted the psychological contract between an employee and the organization as a factor in employee engagement among university academics. In the IES model, the definition of engagement incorporates a 'two-way' relationship between employee and employer (Robinson, Hooker, & Hayday, 2007). Agarwal and Bhargava (2013) found that the Psychological Contract Breach (PCB) hurt work engagement and affective commitment of in eight organizations in India.

Safety (authenticity). Kahn (1990) viewed individual engagement as the employment of personal cognitive, emotional and behavioral factors in executing work tasks. Full investment of cognitive, emotional, and behaviors in a role resulted in a more complete and authentic effort according to Rich, Lepine and Crawford (2010), contributing positively to organizational goals. Rich et al. (2010), among others, developed tools based on Kahn's work (Bailey et al., 2017). AON Hewitt (2015) also cited authenticity as a leadership characteristic facilitating engagement in the 2015 Global Trends in Employee Engagement study. Rao (2017) and Bandura and Lyons (2017) linked authenticity to developing organizational trust in leaders and tasks.

Availability. Kahn (1990) said, "Psychological availability is the sense of having the physical, emotional, or psychological resources to personally engage at a particular moment"(p. 717). He characterized distractions from psychological availability as a "depletion of physical energy, depletion of emotional energy, individual insecurity, and outside lives" (Kahn, 1990, p. 717). Personal engagement requires physical energy, necessary to perform task. Emotional energy was also a factor influencing psychological engagement. Kahn (1990) wrote that emotionally drained individuals found it more difficult to engage. In addition, the level of security people felt about their affected their ability to perform. Finally, Kahn (1990) noted that people's outside lives, "had the potential to take them psychologically away from their role performances" (Kahn, 1990, p. 716). The individual elements listed above and additional organizational factors are key influencers from the literature that influence employee engagement.

Employee Engagement: Organizational Factors

Organizational factors sub-segments include job design, leadership style, team dynamics, and organizational culture. There is significant literature to support each of these sub-segments. A brief review of the literature for each sub-segment appears below.

Job design. Herzberg (1964) developed a theory on job design known as the Motivation-Hygiene or two-factor theory. Herzberg's theory states that employee satisfaction and motivation resonate from intrinsic factors in the work itself. Demotivation comes from external or hygiene factors. Motivating factors include achievement, recognition, learning & growth and increased responsibility (Herzberg, 1968). External factors include salary increases, fringe benefits, and less time spent at work (Herzberg, 1968). The theory focuses on motivation inherent in the work itself, rather than other factors (Hackman & Oldham, 1980). Herzberg also

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noted that job enrichment was an ongoing process and that motivators have a longer-term impact on workers than hygiene factors. Too often, according to Herzberg, the employee had a greater skill that the level of the job (Herzberg, 1968).

Hackman and Oldham (1980) examined job design in their book entitled *Work Redesign*. Building upon research on psychological factors and particularly the Job Characteristics Theory, the authors postulated that internal motivation required the three psychological states of the meaningfulness of the work, staffer responsibility for the outcomes of the work, and employee knowledge of the results of the work (Hackman & Oldham, 1976). Hackman and Oldham (1980) regarded motivation as a persistent state. They believed that all three psychological states were necessary to foster consistent impetus. To achieve the desired psychological conditions, Hackman and Oldham (1980) noted several core job characteristics were necessary. Hackman and Oldham (1980) used the core job characteristics to develop the Job Characteristics Model (JCM). The authors also developed the Motivating Potential Score (MPS), based on the five core motivating characteristics (Hackman & Oldham, 1980). The characteristics are "skill variety, task identity, task significance, autonomy, feedback" (Wilson, 1982, p. 76).

Moderating factors on worker state of mind include knowledge and skill, the worker's personal need for growth, and the degree to which the employee found the overall context satisfying. The authors saw the likely outcomes as high levels of internal work motivation, growth satisfaction, general satisfaction, and work effectiveness. They did not include reduced absenteeism in their theory because of inconclusive data on how motivation mitigates this factor (Hackman & Oldham, 1980). When considered as a whole, Hackman and Oldham (1980) used these factors to develop the JCM to codify their perspective on job design or work redesign. Subsequently, Fried and Ferris (1987) conducted a meta-analysis of approximately 200 studies on

the JCM and did note a correlation between job characteristics and absenteeism. Kahn (1990), the father of employee engagement, build his research premise in part on Hackman and Oldham's proposition that psychological factors inherent in the work inform people's attitudes, behaviors, and level of effort (Kahn, 1990).

Hackman and Oldham (1980) also considered the question of how job redesign would affect the organization. The Job Diagnostic Survey (JDS) is a multiple-methods diagnostic tool they created to gather data on six questions for consideration in assessing an organization's need for job redesign. The questions to consider include the existence of an opportunity for a redesign, a focus on employee motivation or effectiveness, the aspects of the job in need of improvement, and employee and organizational readiness for change.

The impact of leadership. Several leadership factors correlated positively with employee engagement in the literature including transformational leadership (Besieux et al., 2015), and spiritual leadership (Wahid & Mustamil, 2017). According to Sahu et al. (2017), the transformational leadership style directly influences employee retention. Wahid and Mustamil (2017) examined the impact of spiritual leadership on employee engagement and the triple bottom line of people, profits and planet. Their study concluded that businesses could boost engagement and profitability through the adoption of models that consider the importance of emotions and spiritual beliefs. Talented managers also had a positive impact on employee engagement (Harter, 2000). Supportive leadership also correlated positively to a higher level of employee engagement (Jin & McDonald, 2017). Conversely, leaders who allowed distractions, such as cell phone usage, to interference with interactions with their staff, adversely influences employee engagement (Roberts & David, 2017).

Other organizational factors. Additional factors that affect employee engagement

include corporate social responsibility, diversity & inclusion, employee voice, and the firm's

approach to talent management. Corporate Social Responsibility (CSR) in conjunction with

other factors had a positive correlation with employee engagement in several studies (Besieux et

al., 2015; Gupta, 2017). Complementary factors to the CSR employee engagement correlation

were transformational leadership and organizational commitment.   Pleasant (2017) examined

the impact of workplace diversity and inclusion (D&I) efforts on employee engagement. She

suggested that there might be a correlation between employee engagement and D&I strategies

due to a common theme of leveraging unique employee attributes in the workplace. Her study

recommended human resource professionals consider the correlation with personal interests of

employees.

Communication and employee voice also correlated positively with employee

engagement. Employee voice is an opportunity for employees to express work-related ideas and

opinions intentionally (Ruck, Welch, & Menara, 2017). Expression of employee voice occurs in

multiple ways including routine conversations with co-workers, receptivity of line management

to employee ideas and concerns, and annual employee surveys. Ruck et al. (2017) found that

internal communication, employee voice, and management receptiveness has a significant and

positive relationship with organizational engagement. Based on the correlation between factors,

the authors recommend building employee voice into the corporate communication strategy.

A company's Talent Management (TM) approach also influences employee perception of

organizational justice and fairness that affect employee engagement. When companies practice a

TM approach where certain employees or groups of employees receive additional benefit by

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being more talented, less talented employees develop concerns around fairness. These concerns may in turn result in reduced employee engagement (O'Connor & Crowley-Henry, 2017).

Employee Engagement: Tools and Models

Since 1990, several organizations have developed measurement instruments to both validate employee engagement as a construct and to provide tools to help organizations quantify and improve engagement outcomes. However, not all tools use the same approach or use the same measures. The roots of some tools are in employee satisfaction, while other found their genesis in job satisfaction, burnout, or multi-dimensional factors (Anthony-McMann, Ellinger, Astakhova, & Halbesleben, 2017). Through a review of the literature, identification of several measurement scales occurred (see Table 1)..

Table 1

A Sample of Employee Engagement Survey Tools

Survey Tool & Versions	Year Developed	Population Surveyed	Measures
1. Gallup Q^{12} (Harter, et al., 2016)	1996	7 million+	Workplace attitudes leading to job satisfaction
2. Institute of Employment Studies (IES). IES Engagement Model & tool Robinson et al., 2004, 2007	2003	Over 10,000	Ten factors leading to feeling valued and involved; job satisfaction
3. Utrecht Work Engagement Scale (Schaufeli & Bakker, 2004)	1999	Over 30,000	Work engagement (vigor, dedication, and absorption) as the opposite of burnout
4. Job Engagement Scale (JES) (Rich et al., 2010)	2010	345	Cognitive, emotional and physical engagement
5. Federal Employee Viewpoint Survey (FEVS-EEI) (Byrne, Hayes, Holcombe, 2017)	2002 2010	241,465	Leaders lead, supervisor, intrinsic work experience

Gallup Q^{12} survey and reports. In the 1930s, Dr. George Gallup began to study human

needs and satisfaction globally. He continued polling groups throughout his lifetime. In the

1970's, Dr. Gallup uncovered in a poll that less than 50% of employees in North America felt

highly satisfied with their jobs (Gallup, 1976). In parallel, Dr. Donald O. Clifton and colleagues

studied strengths-based psychology, which is the strengths and attributes of individuals that

cause them to thrive. Initial discoveries by Dr. Clifton's team led to an understanding of factors

leading to success for both individuals and organizations (Piersol, 2015). In 1988, Dr. Clifton's

firm, Selection Research, Inc., acquired Gallup. After the merger, the combined company

worked under the name of The Gallup Organization (Santosus, 1994). Subsequently, the firms

blended their work leading to an iterative refinement of their survey questions and techniques

and research on causes of individual and business-unit success in the workplace. The two firms

continued to refine their approach and the study of behaviors leading to positive outcomes for

both individuals and corporations on a global scale. In the 1990's, The Gallup Organization

developed the initial version of the Gallup Workplace Audit (GWA) also known as the Gallup

Q^{12} survey. Finalization of the wording of the Gallup Q^{12} tool occurred in 1998 (Harter et al.,

2016).

The Gallup Q^{12} survey measures employee engagement, according to Gallup (2016).

Gallup also states that over three decades of qualitative and quantitative research support the

validity of the Q^{12} tool. As of 2016, surveys on over 7 million employees in 112 countries

occurred using the Gallup Q^{12} tool. The tool design facilitates the measurement of attitudinal

outcomes such as satisfaction, organizational pride and customer service intent, and the

measurable actions managers can take to influence the attitudinal outcomes. After an overall

company satisfaction score, the 12 items in the survey measure the degree to which a worker is

personally engaged on the job. A copy of the Q^{12} survey questions is in the Q^{12} Meta-Analysis

(Harter et al., 2016). In brief, the Q^{12} tool measures employee expectations, access to materials

and equipment, the opportunity to leverage strengths, receive recognition, feel cared about, and

receive developmental opportunities. Other measures are the opportunity to feel valued, aligned

with organizational purpose, produce quality work, have positive relationships, grow

professionally, and learn.

Beyond the study of individual engagement, the Gallup tool examines business-unit

outcomes based on staff collective engagement. The business unit analysis lends to the

opportunity to link business outcomes such as profitability and customer service to collective

engagement within a unit (Harter et al., 2016). A recent business-unit meta-analysis conducted

by Gallup examined 13,751 business and work units regarding employee attitudes of safety and

engagement, with organizational outcomes including staff turnover, customer survey results, and

financial performance. The meta-analysis included 20 studies conducted exclusively outside of

the United States, and from four other continents. The results demonstrated a consistent

predictive correlation between employee attitudes and business performance. The Cronbach's

alpha for the Q^{12} tool at the business unit level is 0.91. This score indicates a high level of

internal consistency across the organizations and outcomes. Whatever the Q^{12} is measuring, it

measures it consistently. According to Gallup, the Q^{12} tool measures employee engagement.

Institute of employment studies (IES) survey and reports. The Institute for

Employment Studies (IES) is a United Kingdom-based international center of consulting and

human resources research. Founded in the late 1960s as the Institute of Manpower Studies

(IMS), the organization changed its name to IES in 1994 (Institute of Employment Studies, n.d.).

In 2004, IES published the initial phase of its research on employee engagement. IES examined

over 40 public and private companies in phase 1 to define employee engagement and

subsequently developed their engagement model and tool. Next, IES conducted an initial test of

the tool on England's National Health Service (NHS). IES surveyed over 10,000 NHS employee

as a sample. In the NHS study, a sense of feeling valued was the biggest driver of employee

engagement (Robinson et al., 2004). IES noted, however, that engagement levels vary with

demographics, job characteristics, and job role. Notable as well was that IES reported much

higher engagement levels for employees with an individual development plan and who received

a performance appraisal within the last year.

IES conducted the second phase of research using the tool and published Phase 2 results

in 2007. For Phase 2, IES surveyed eight organizations with sample sizes from 33 to 461. They

collected a sample of 1,405 surveys from the eight organizations. Also, a subset with $n = 381$

from the NHS study was also included, bringing the total sample size to 1,786.

In Phase 2, IES discovered three additional drivers of employee engagement – job

satisfaction, equal opportunities and health, and emotional safety. Their report noted that job

satisfaction was an employee engagement driver across most organizations. Some organizations

had other engagement drivers. Feeling valued and involved was a driver in some organizations,

but not universally (Robinson et al., 2007). Table 1 shows the sub-drivers associated with each

driver. IES also noted driver differences between groups including managers, professionals,

laborers and support functions (Robinson, et al., 2007).

Utrecht work engagement scale (UWES) and reports. The Occupational Health

Psychology Unit of Utrecht University in The Netherlands developed the Utrecht Work

Engagement Scale (UWES) in 1999 to measure work engagement (Schaufeli & Bakker, 2004).

The authors noted that before 2003, about 95% of articles published in the *Journal of*

Occupational Health Psychology dealt with factors leading to ill health and well-being as opposed to factors promoting health. With the advent of Positive Psychology, the emphasis shifted to a greater focus on the positive attributes of health and well-being. Work engagement is a positive aspect and considered as the opposite of burnout. As part of their research into work engagement, Schaufeli and Bakker developed the UWES engagement scale in 1999.

Schaufeli and Bakker defined work engagement as characterized by vigor, dedication, and absorption (Schaufeli & Bakker, 2004). Vigor is the amount of energy and physical stamina workers bring to the job. Dedication is the sense of significance derived from work, including feelings of inspiration, challenge, and pride. Absorption is the degree to which employees feel happy and immersed in their work. Fully absorbed employees note that the day passes quickly as they report consumption with the task at hand (Schaufeli & Bakker, 2004).

The UWES tool evolved from the original 24-item model to 17, 15 and nine element representations. Refinement of the tool also occurred and several validity factors emerged including validation of the three-factor (vigor, dedication, and absorption) structure. The Cronbach's α for most versions of UWES ranges between .8 and .9, indicative of solid internal consistency. Various studies show validity in measuring the correlation between work engagement and burnout, work engagement and workaholism, and possible causes of work engagement. Studies show a positive correlation between work engagement and co-worker support, coaching, job task, relationship with direct supervisor, self-efficacy, and performance feedback. Validation of the tool also occurred in 12 nations in the early years (Schaufeli & Bakker, 2004). The initial sample size was 9,679. Today, over 35 countries use the UWES instrument (Petrović, Vukelić, & Čizmić, 2017), with a sample size of over 30,000 (Schaufeli &

Bakker, 2010). These countries include Russia, China, South Africa, Spain, Germany, Australia, Canada, and Japan, among others.

Additional items of note from the UWES model include engagement weakly correlates with age, positively. Men showed slightly higher engagement than women did, and there were differences in engagement between job categories. The 9-question version shared similar validity and consistency characteristics with the longer 15-question version. Current research is examining the use of the tool at the national level. Also, evidence exists that all Big-5 personality traits correlate to work engagement. Finally, an additional application is the advent of general engagement beyond the workplace via the Utrecht General Engagement Scale (UGES), which is a variant of the original tool (Schaufeli, 2017). Researchers are examining applications in sports, education, and leisure activities.

Job engagement survey (JES) and reports. The Job Engagement Survey is an 18-item tool developed in 2010 based on Kahn's (1990) initial personal engagement and disengagement construct. The researchers supported Kahn's (1990) engagement approach because they felt it provided a broader definition more descriptive of worker's opportunity to engage fully multiple aspects of themselves in the work environment (Rich et al., 2010). The research team also indicated the broader definition provided a better definition of the relationship between engagement and various elements of job performance.

The JES tool has six elements for each of three factors – physical engagement, emotional engagement, and cognitive engagement. The cognitive engagement factor measures absorption and attention. The emotional engagement factor measures enjoyment and activation based on employee feeling about the work experience. The physical engagement factor measures exertion and intensity directed toward work tasks (Shuck, Nimon, & Zigarmi, 2017).

Firefighters and their supervisors comprised the original sample of 245 workers. The tool was then cross-validated using a sample of 180 staffers at a nursing care facility. Overall, the studies found that engagement mediates value congruence, perceptions of organizational support and self-evaluation. Also, Organizational Citizenship Behavior (OCB) and task performance impacted by employee engagement. Interestingly, in comparison to other studies, intrinsic motivation, job involvement, and job satisfaction were not major drivers of employee engagement (Rich et al., 2010).

Federal employee viewpoint survey (FEVS-EEI). The Federal Employee Viewpoint Survey (FEVS) measure employee perceptions of whether the characteristics of successful organizations exist in their agency (Byrne et al., 2017). Developed in 2010, the Employee Engagement Index (EEI) component of FEVS includes three sub-factors – leaders lead, supervisor, and intrinsic work experience to measure engagement (U.S. Office of Personnel Management, 2010). The leaders lead sub-factor, captures employee perceptions of the leader's integrity and leadership behaviors. The supervisor sub-factor captures the employee-supervisor dynamic including trust and respect. The intrinsic work experience reflects if employees feel motivated and competent in their role (U.S. Office of Personnel Management, 2010). From data provided by the U.S. Office of Personnel Management (2010), the FEVS-EEI engagement score supports the link between engagement and intention to stay.

Curiously, the FEVS-EEI tool proved an inconsistent predictor of work engagement using standard developed in academia (Byrne et al., 2017). Of the factors examined, only the indicator of job resources significantly predicted worker engagement. The FEVS-EEI was most similar to indicators of work or job resources rather than as a stand-alone predictor of employee engagement. With the addition of leadership behaviors to the analysis, FEVS-EEI data indicated

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engagement derived from the work environment, not interaction with the supervisor. In summary, the FEVS-EEI as a stand-alone gave mixed results, and limited information about the level to which employees will engage.

Other tools. There were many other tools encountered during the literature review. A few of these are the Organizational Commitment Scale (OCS), DecisionWise MAGIC survey, and Development Dimensions International (DDI) engagement model. The DecisionWise survey, which is an 18-item survey organized around Meaning, Autonomy, Growth, Impact, and Connection (MAGIC). Meaning is: What personal worth does the work hold for the individual? Autonomy in the model has the characteristic of freedom to perform the work in the best way for the worker and the organization. Growth is the ability to develop new skills through challenging and exciting work opportunities. Impact is the ability for a worker to see the difference their work makes for the firm. Connection is an emotional sense of belonging to the team or organization. Notably, the DecisionWise survey examines both transformational and transactional leadership styles (Maylett, 2012).

The Development Dimensions International (DDI) approach is to measure engagement propensity. DDI believes some have personal attributes that naturally correlate to a higher level of engagement. Through their research across six client organizations, DDI found engagement correlated to six factors: "attachment to the job, agreeableness, emotional stability, openness to experience, achieve orientation and self-efficacy" (Wellins & Bernthal, 2015, p.11). The DDI model stresses the importance of job fit, leadership and systems supporting the work environment leading to an engaged employee and organizational success (Wellins, Smith, & Erker, 2006).

Organizational Commitment (OC) is the strength of an individual's identification with their organization (Shuck et al., 2017). Characterizations of OC include three factors: a strong belief in the organization's values and goals; a willingness to make extra effort for the organization, and a desire to remain part of the organization (Mowday, Steers, & Porter, 1979). The Organizational Commitment Questionnaire (OCQ) has 15 items (Mowday et al., 1979). Initially administered to 2,563 employees across nine organizations, the tool measured job involvement, job satisfaction, career satisfaction, performance motivation, and other factors. The tool had a consistently high Cronbach's alpha, with a median of .9, and was stable as a tool.

Sample models. Bersin (2015) of Deloitte Consulting proposed an organizational model for employee engagement including five elements. These elements are meaningful work, hands-on management, positive work environment, growth opportunities, and leaders who foster trust (Bersin, 2015). Meaningful work includes the sub-elements of autonomy, job-role fit, teamwork, and schedule flexibility. Hands-on management incorporates clear goals, coaching, and leadership development and performance management. The positive work environment includes a flexible work environment, a culture of recognition, diversity, and consideration of human factors. Growth opportunities are inclusive of learning and development, and talent mobility. Trustworthy leaders include clarity of mission and purpose, transparency and integrity, inspiration and investment in personnel. The model incorporates psychological research from Gallup, psychologist Daniel Pink, Deloitte, and others.

AON Hewitt's (2015) engagement model includes leadership roles, performance, and the nature of the work, company policies and the company brand as engagement drivers. Engagement outcomes include communication, intention to stay, and growth orientation. Business outcomes include retention, absenteeism, productivity, customer outcomes, and the

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company's financial outcomes. AON Hewitt (2015) conducts a regular survey of employee engagement trends to update the model.

Employee Engagement: Individual and Organizational Outcomes

The literature characterized by the author as employee outcomes is segmented into the categories of job satisfaction, Organizational Citizenship Behavior (OCB), employee performance, alignment, and employee burnout. There is a compendium of research on each category. A brief description of each category appears below. In addition, a representative sample of the research appears below as references. Organizational outcomes stemming from the employee outcomes categories include increasing sales, customer service levels, and employee retention.

Burnout. Burnout is the antithesis of work engagement, according to Schaufeli (2001). Exhaustion and cynicism are the core components of burnout (Schaufeli, Salanova, González-Romá, & Bakker, 2002). While engaged workers communicate vigor, dedication, and absorption, burned-out workers exhibit cynicism and exhaustion. Researchers took an empirical approach to examining and measuring burnout. In a study, researchers used the Maslach-Burnout Inventory-General Survey (MBI-GS) to assess the relationship between engagement and burnout. They found that exhaustion and cynicism negatively related to engagement and comprise. Exhaustion and cynicism share between 22% and 38% of the variances in their population samples. Others researchers have used the Utrecht Work Engagement Scale, and found a negative correlation between work engagement and burnout (Schaufeli et al., 2002).

Job satisfaction. Historically, researchers also studied the links between job satisfaction and morale (Brayfield & Rothe, 1951). The research uncovered that the effectiveness of selection, training, and supervisory programs impact employee job satisfaction (Lawler & Hall,

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1970). In another study, job involvement, like job satisfaction, bore a significant relationship to certain job characteristics. Unlike job satisfaction, however, involvement positively related to a self-rated effort in this particular study (Jon, 2010).

Organizational citizenship behavior (OCB). In their study on Organizational Citizenship Behavior (OCB) Rich et al. (2010) found that engagement mediates task performance and organizational citizenship behavior. Similar to the topic of employee engagement, definitions of OCBs vary. In their study on OCBs, Podsakoff, Aheame, & MacKenzie (1997) segmented OCBs into three behaviors. The classifications are helping, sportsmanship, and civic virtue (Podsakoff, Aheame, & MacKenzie, 1997). As demonstrated by the multiple classifications, multiple behaviors define OCBs. This breadth requires an understanding of what a researcher is examining when analyzing OCBs. Podsakoff, Aheame, & MacKenzie (1997) focused on the impact of helping behavior and sportsmanship on work group performance quality and quantity. Their research indicated helping behavior had significant effects on both performance quality and quantity.

Organizational performance. Beginning in the 1970s, researchers started to examine the impact of behaviors and other human engagement factors of organizational performance. A study conducted in a large United Kingdom retail business used data from 65,000 employees and 25,000 customers. The study concluded that strong evidence existed linking employee satisfaction and commitment to customer satisfaction and increased sales (Barber et al., 1999). An additional study on 7,939 business units found a significant link between employee engagement and profitability at the business-unit level. One implication is that changes in leadership approach leading to greater employee satisfaction have the potential to improve business performance, including profitability (Harter et al., 2002). Again, the implication is that

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changes in leadership approach to performance measures and management may lead to enhanced employee engagement and business performance.

Employee Engagement: Conclusion

Since Kahn's initial research in 1990, there has been a proliferation of research and writing on the topic of employee engagement. While definitions of employee engagement vary, common themes include psychological factors, job design elements, and the impact of organizational culture, teams, and leadership. There is general agreement that employee engagement results in positive personal and organizational outcomes including increased employee retention, reduced burnout, higher levels of customer service and satisfaction, and increased organizational sales and profitability. Researchers in both academia and industry alike are striving to be precise in the definition the drivers and outcomes of employee engagement. One of several desired outcomes is to help employees and organizations achieve superior results through alignment of personal and corporate objectives. Researchers examined multiple industries.

Emotional Intelligence: Introduction

Listed by *Time Magazine* (Time.com, 2018) as one of the twenty-five most influential business management books, psychologist Daniel Goleman's *Emotional Intelligence* (Goleman, 1995) popularized the notion of Emotional Intelligence (EI). Yet the initial conceptual framework for EI was set up years earlier in writings from Beldoch (1964), Gardner (1983), and Salovey and Mayer (1990). These theorists and others built the foundation upon which the EI concept grew (Salovey & Mayer, 1990). A discussion of the concept, along with a brief history on the evolution of EI, appear below. Also examined subsequently are tools and models currently in use to measure EI, also called the Emotional Quotient (EQ; Beasley, 1987). For this

study, EI, EQ and Emotional Intelligence Quotient (EIQ) are synonymous unless otherwise stated. A review of elements that increase or decrease EI appears as well. Finally, an overview of literature discussing the impact of EI on individual and organizational outcomes is included, along with a brief recap on the topic.

Emotional Intelligence: History

The notion of intelligence built upon theories primarily involving cognitive ability, with emotions thought of as disturbances that made people lose control (Young, 1943). Woodworth (1940) implied that IQ tests were ineffective when a person's thoughts were emotional. Over time, however, theorist began to postulate that emotions were useful and not in opposition with intelligence (Mowrer, 1960). Mowrer (1960) added, "Emotions are a higher order of intelligence" (p. 308). The above works and others are foundational for later works on emotional intelligence (Gayathri & Meenakshi, 2013).

One of the earliest writing where the term emotional intelligence appears was in a book entitled *The Communication of Emotional Meaning* (Davitz, 1964). In an article in the book entitled *Sensitivity to Expression of Emotional Meaning in Three Modes of Communication*, Beldoch (1964) used the term "emotional intelligence"(p. 39) as part of a conceptualization on an individual's ability to identify emotions communicated in various modes. Beldoch's (1964) postulation centered on the notion of emotional sensitivity to meaning contained in three modes of communication including verbal, musical and graphical. Beldoch's (1964) quantitative study concluded there was significant correlation across the subject to identify the expression of emotion in all three media.

In his writing *Frames of Mind*, Gardner (1983) defined intelligence as the ability to solve problems or to fashion products within a cultural context. Gardner (1983) viewed overall

intelligence as a mixture of multiple components with an individual possessing each factor to a different extent. He also postulated that people have intellectual capacity in a number of different areas, not just an overall capacity for thought. Gardner (1983) also said these multiple intelligence components were not readily discernable by conventional testing methods. He also spoke of the concept of intrapersonal and interpersonal intelligences as subsets of the overall theory.

Seven year later, Salovey and Mayer (1990), wrote an article entitled *Emotional Intelligence* that further presented a framework for the concept. The idea was included under the umbrella of social intelligence (Gayathri & Meenakshi, 2013). Salovey and Mayer (1990) defined emotional intelligence as "a subset of social intelligence that involves the ability to monitor one's own and others' feelings and emotions, to discriminate among them, and to use this information to guide one's thinking and action" (Salovey & Mayer, 1990, p. 189). Their framework laid out a three-level conceptualization of emotional intelligence. Level one involved the appraisal and expression of emotion, the regulation of emotion, and the utilization of emotion. Level two was the application of level one to both oneself and to others. Level two also included utilization of flexible planning, creative thinking, redirected attention and motivation to manage emotion. Level three included verbal and non-verbal self-expression, the ability to perceive non-verbal cues from others, and the ability to elicit empathy from others. The work of Salovey & Mayer (1990) built upon earlier work on social or personal intelligences by Gardner (1983).

Fifteen years later in his book, Goleman (1995) wrote about the two minds humans possess – rational and emotional. Goleman (1995) went on to define emotional intelligence as a composite of five elements: self-awareness, self-regulation, motivation, empathy and social

skills. The wide acceptance of Goleman's (1995) best-selling book served to make emotional intelligence a popular concept (Gayathri & Meenakshi, 2013). In a similar fashion to the definition of employee engagement, the meaning of emotional intelligence is evolving as multiple investigators put forth theories supported by research to varying degrees (Gayathri & Meenakshi, 2013). For the purposes of this study, Goleman's framework, which builds on Salovey & Mayer's (1990) concept, will guide the analysis.

Emotional Intelligence: Elements

Outlined below are each of the five elements of (EI) as defined by Goleman (1995). Several research articles referenced herein use the Goleman (1995) or Salovey and Mayer (1990) framework, which aids the congruency of concepts throughout this document. Outlined as well is an additional concept, Social and Emotional Learning (SEL). Conducted initially in a K-12 setting, the initial research for SEL correlated to Goleman's work on EI. Details on the overlap appear in the appendix of *Emotional Intelligence* (Goleman, 1995).

Self-awareness. Goleman (1995) defines self-awareness as the ability to interpret accurately interpret feelings in real time. An individual's ability to be self-aware in the moment allows that person to identify clearly their emotional state of mind in the moment. Self-awareness is the cornerstone of EI according to Goleman (1995). Self-aware people are in a good position to limit the extent to which emotions control their actions.

Self-regulation. An individual's ability to identify accurately emotion facilitates their self-regulation. Self-regulation helps a person to disconnect their natural emotional response from their behavior. They are able to act consciously rather than react emotionally. Resiliency to negative stimuli is a component of self-regulation. Such individuals rebound from negative

emotions such as anger or anxiety more quickly than others who are not as self-regulated (Goleman, 1995).

Motivation. Motivation helps an individual focus emotional energy toward a desired goal. Motivated individuals defer immediate gratification to achieve long-term success. Such individuals respond well to challenges and are more highly productive than those who are weak in this trait.

Empathy. Empathy is the ability to discern and relate to the needs and views of others. People strong in empathy are in touch with the verbal and non-verbal cues from those around them. Empathetic individuals are able to use the cues to relate and to respond properly to the emotional state of others.

Social skills. Social skills comprise the art of relationship management. Leveraging self-awareness, self-regulation, and empathy, social skills help an individual to manage emotions in those around them (Goleman, 1995). People with strong social skills are able to help others solve problems, resolve conflicts. They are effective leaders. Social skills are foundational to transformational leadership.

Social and emotional learning. Similar to the definition of EI above,

Social and Emotional Learning (SEL) is the process through which children and adults acquire and effectively apply the knowledge, attitudes, and skills necessary to understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions.

(CASEL.org, 2018, para.1)

According to CASEL.org, SEL has five core competencies including self-awareness, self-management, social awareness, relationship skills and responsible decision-making (Durlak &

Weissberg, 2011). SEL overlaps with EI. Goleman's Emotional Intelligence book began to foster coordination between the academic K-12 research and psychologists and researchers studying human emotion (Durlak & Weissberg, 2011).

With the clear framework above, a discussion of how experts measure EI follows. Some discussion of how to increase EI based on the tools also appears. While each of the tools covered below takes a slightly different approach to the measurement of EI, all adhere to the basic concept. As mentioned, the term EI and EQ are synonymous for the purposes of this study.

Emotional Intelligence: Tools and Models

There are multiple EI assessment tools available with corresponding studies demonstrating the tools ability to measure the impact of EI on effective leadership (Palmer et al., 2001). Generally, there are three approaches to measuring EI – self-reporting, 360-degree feedback reports and ability/performance reports (Langley, 2012). While various tools exist, a listing of four well-known research-based EI research tools appears in Table 2.

Table 2

A Sample of Emotional Intelligence Measurement Tools

Tool & Version	Year Developed	Population Examined	Measures
1. Mayer-Salovey-Caruso EI (MSCEIT) test (Brackett & Salovey, 2006)	Model - 1997 Tool - 2002	Normative sample base of 5,000 U.S. residents	MSCEIT is a set of abilities test with a similar premise as an IQ test measure cognition
2. EQ-i 2.0 (Bar-On model, Bar-On, 2006)	1997	Normative sample of 3,831 adults in North America	EQ-I measure EI as a set of social or emotional traits (continued)

Tool & Version	Year Developed	Population Examined	Measures
3. Emotional and Social Competency Inventory (ESCI) (Goleman, 2018; Hay Group, 2011)	1998	Over 42,000 respondents, from 273 organizations	The ECI measures EI against levels expected based on role
4. Genos EI (Palmer et al., 2009)	2007	4,775	The Genos EI tool measure EI based on behaviors, vs. traits, cognition or expected levels

Mayer Salovey Caruso EI test (MSCEIT). As noted in Table 2, the MSCEIT is an ability test that measures an individual's EI aptitude. Salovey and Mayer (1990) consider EI as a mental process to manage one's personal emotions and those of others as well. The tool does not measure traits or personality as other instruments do (Brackett & Salovey, 2006). The four subtests or branches of EI measured by the MSCEIT are perception, use to facilitate thinking, understand and management of emotion. Some findings suggest a positive correlation to several aspects of job performance (Brackett & Salovey, 2006). Overall, the research suggests that EI as a mental ability can be reliably measured and is predictive of behavioral outcomes.

EQ-i 2.0 (Bar-On model). The EQ-i tool is a self-reported measure of social-emotional intelligence and behavior. The tool is an operationalization of the 15 factor Bar-On model of emotional-social intelligence (Bar-On, 2006). The 15 factors of the tool are:

Intrapersonal (comprising Self-Regard, Emotional Self-Awareness, Assertiveness, Independence, and Self-Actualization); Interpersonal (comprising Empathy, Social Responsibility, and Interpersonal Relationship); Stress Management (comprising Stress Tolerance and Impulse Control); Adaptability (comprising Reality-Testing, Flexibility,

and Problem-Solving); and General Mood (comprising Optimism and Happiness).

(Bar-On, 2006, p. 15)

The Bar-On model developed in stages including a literature review, grouping of like skills, behaviors and competencies, experimentation, development of the 15-scale model, norming of the EQ-I model, and continued data collection and validation of the model.

Emotional and social competency inventory (ESCI). The ESCI tool is a 360-degree survey that measures EI. The tool shows a 360° view into the behaviors that differentiate highly effective from average performers. The tool measures 12 competencies across four ability areas (Goleman, 2018; Hay Group, 2011; see Table 3). Table 3 is derived from the definition of EQ used in the tool from the Hay Group (2011) in conjunction with Goleman (2018). Based on Goleman's (1995) work, writings by McClelland (1973) and Boyatzis, Baker, Leonard, Rhee, and Thompson, (1995), the tool focuses on organizational EI success factors. Research using the tool continues on a global basis (Hay Group, 2011).

Table 3

ESCI Abilities and Competencies Map

Ability	Emotional Competency
1. Self-awareness	Self-awareness
2. Self-management	Self-control Goal orientation Perspective and outlook Adaptability
3. Social awareness	Empathy Social awareness
4. Relationship management	Influence others through: Coaching Mentoring Conflict resolution Inspiration Teamwork

Genos EI. The Genos Emotional Intelligence Inventory or Genos EI, is an assessment that measures seven abilities over 70 competencies (Palmer et al., 2009). The seven abilities are emotional self-awareness, emotional expression, emotional awareness of others, emotional reasoning, emotional self-management, emotional management of others, and emotional self-control. The tool is designed to measure how often people demonstrate 70 emotionally intelligent workplace behaviors (Palmer et al., 2009). The tool focuses on behaviors, not traits or skill (Palmer et al., 2009).

With each of the various tools designed to measure EI traits, behaviors and abilities, there are corresponding approaches to increase EI. Each of the research-backed tools above has studies that support the approach. There are also general tips to increase EI from literature. Several tips appear below.

Emotional Intelligence: Tips to Increase EI from Literature

Tips to increase EI from the works of Ni (2014), Llopis (2014), and Chamorro-Premuzic & Sanger (2017), include demonstrating care for your people, embracing of differences with a focus on performance, leading by example, and calm, consistent authentic communication. Celebration of team wins and candor in difficult situations are important EI factors. According to the literature, transformational leaders possess most of these traits.

Demonstrate care for your people. Effective leaders make the extra effort to say thank you, show genuine interest in team members as individuals and take the time necessary to mentor and encourage. It is important to find opportunities to meet employee needs beyond immediate organizational demands. Whenever possible, make the additional sacrifice to demonstrate care for others.

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Embrace differences, yet remain focused. Effective teams and workgroups are often

diverse. When leading a diverse team look for common ground and build consensus from these

shared values while allowing each individual room for authentic behaviors. Gain agreement

around and focus on the ultimate team goal while supporting individuality targeted toward

organizational performance.

Lead by example. Effective leaders model appropriate behavior and responsibility for

the team. They seek accountability and mentoring from their leader or a peer outside their group

to maintain a high standard of personal performance. They accept responsibility for

shortcomings and articulate a plan for correction with milestones. They demonstrate personal

resiliency. They achieve these milestones with the help of the group. This sets the tone for

departmental performance.

Calm consistent communication. Be proactive and not reactive to difficult individuals

and situations. Remain calm in the face of pressure. Use walks, physical activity, music and

meditation as tools to keep calm and to process emotion prior to communication. Be authentic,

assertive yet non-reactive in interactions. Celebrate wins and be direct in difficult situations as

necessary.

Emotional Intelligence: Individual and Organizational Outcomes

Significant controversy exists in the academic community concerning the perceived

importance of Emotional Intelligence (EI) to leadership effectiveness and organizational success.

Yet, there is a substantial amount of literature indicating EI is a key element of leadership

effectiveness and team performance (McCleskey, 2014; Palmer et al., 2001). Other studies

indicate that employees perceive EI (EQ), as an important element of the effectiveness of their

leaders (Dabke, 2016; Kelly & Murphy, 2015). Moreover, additional research indicates a correlation between EI and profitability (Langhorn, 2004).

Multiple studies have indicated teams are more productive and creative when the characteristics of EI are significant and implemented by members (Druskat & Wolff, 2001). To drive performance and overall effectiveness, team leaders must facilitate an environment supportive of group norms that foster strong group EI (Druskat & Wolff, 2001). In summary, there is significant research to support the notion that leaders must be exhibit strong levels of EI to be more effective in driving organizational financial performance and business results (Llopis, 2014).

Emotional Intelligence: Conclusion

Daniel Goleman's *Emotional Intelligence* (Goleman, 1995) popularized the concept of Emotional Intelligence building upon the early framework from Beldoch (1964), Gardner (1983), Salovey and Mayer (1990) and others. While there are variants, Goleman's definition of self-awareness, self-mastery, motivation, empathy and social skills is a widely accepted framework. Research-based tools to measure EI include the MSCEIT, which focuses on ability, and the EQ-i 2.0, which focuses on traits. Other tools include the competency-based ESCI and the behavior-based Genos EI. These tools and others measure EI and offer insight on how individuals may increase their EI. The social skills aspect of EI is a key component of transformational leadership and more fully discussed in the next section.

Transformational Leadership: Introduction

Data support the effectiveness of TL in garnering employee engagement and reduction of employee intention to quit (El Badawy & Bassiouny, 2014). TL also positively affects organizational citizenship behavior (El Badawy & Bassiouny, 2014, Rodrigues & Ferreira,

2015). Followers view transformational leaders as fair and consistent in the treatment of

subordinates (Deschamps, Rinfret, Lagacé, & Privé 2016). The sections below outline the

history of the transformational leadership concept, key elements, models and tools and

operational outcomes.

Transformational Leadership: History

The term *transformational leadership* appeared first in the writings of Downton (1974).

The term became more widely popular with the publication of *Leadership* (Burns, 1978). In

1985, Bass further elaborated on transformational leadership, stating that it was more a part of a

continuum rather than a separate model (Bass, 1985). The Bass (1985) model appears below.

Transformational Leadership: Elements

The definition of transformational leadership (TL) is idealized influence, individualized

consideration, intellectual stimulation and inspirational motivation of subordinates (Ghasabeh et

al., 2015). TL has evolved over the years, but the core attributes remain consistent. Below is a

discussion of the major elements of TL. As noted earlier, key elements of TL overlap with EI

self-awareness, self-control, social awareness, and relationship management.

Idealized influence. This element refers to leaders' personal example and conduct. Such

leaders have high standards for ethics and behavior. Building trust is another aspect of idealized

influence. Their followers hold them in high esteem due to the consistent personal example they

set.

Inspirational motivation of subordinates. This characteristic describes leaders' ability

to inspire others with a compelling vision. Such leaders instill confidence and self-efficacy in

their followers. These leaders are optimistic about the future. In addition, this quality inspires

others through oratory skills. This leadership skill is an important component of charisma.

(Bono & Judge, 2004).

Intellectual stimulation. This element refers to leaders' ability to encourage thought in

others. Risk taking and creativity are intellectual stimulation traits. Innovation is other way that

leaders can stimulate followers. This quality leads to pacesetting ideas and new ways of

achieving organizational goals (Bono & Judge, 2004).

Individualized consideration.   This leadership element refers to leaders' ability to

create unique approaches in consideration of individual's unique abilities. This skill is involved

in the development of subordinates. Both coaching and mentoring are elements of individualized

consideration. Empathy, respect, and candid feedback are additional factors. Leaders leverage

this skill to act as both mentor and coach (Bono & Judge, 2004).

Transformational Leadership: Tools and Models

Two popular models that measure transformational leadership are the Multifactor

Leadership Questionnaire (MLQ) and the Five-Factor Personality test. Table 4 gives a summary

of both tools. The table is derived from the definitions of MLQ by Bass and Avolio (1994) and

five-factor personality test by Robinson et al. (2004).

Table 4

A Sample of Transformational Leadership Measurement Tools

Tool & Version	Year Developed	Measures
Multifactor Leadership Questionnaire (MLQ) (Bass & Avolio, 1994)	1990	Leadership characteristics and provide a guide for training
Five Factor Personality Test (Robinson et al., 2004, 2007)	1984	Neuroticism, extraversion, openness, agreeableness, conscientiousness

Multifactor leadership questionnaire (MLQ). The MLQ tool has 36 items that assess a leader's own personal assessment of their leadership skills. Twenty of the 36 items measure transformational leadership. It is a nine-factor model that measures both transformational leadership, and transactional leadership. Bass & Avolio (1994) developed this approach. It is a 360-degree feedback tool.

Five factor personality test. This test measures five traits including extraversion, agreeableness, conscientiousness, neuroticism and openness (Digman, 1990; McCrae & Costa, 1987). The five-factor personality test measures personality traits along a continuum. The five-factor approach considers traits as the approach to measuring an individual's behavior and temperament. This continuum can measure transformational leadership (Goldberg, 1992).

Transformational Leadership: Individual and Organizational Outcomes

Lee, Cheng, Yeung, and Lai (2011) said that the five dimensions of transformational leadership affect team competency, satisfaction, performance, and levels of customer service. Banks need to deliver increasingly sophisticated levels of service due to the impact of technological change. A transformational leadership style helps to engage employees and increase staff feelings of control over the work they do. Over 30 business units covering 15 banks and 192 staffers participated in the survey.

Gray and Williams (2012) found that successful retail managers were transformational leaders. Less successful leadership were at the less involved end of the spectrum. Successful leaders use conflict and other challenging periods to inspire followers to victory during difficult times. The TL approach has a positive correlation with improved financial performance. Proper conflict management inspires others. Especially when aligned with the strategic direction of the organization.

Transformational leader's impact on turnover and retention. Hurst and Good, (2009) found that direct supervisors have a significant impact on the career choices of each career hires. Career coaching conversations and direction provided by front-line managers has a significant impact on turnover and retention in the retail environment. In Europe, wages and job quality were significant retention factors apart from TL (Martinuzzi, Kudlak, Faber, & Wiman, 2011).

Transformational Leadership: Conclusion

Bass and Avolio (1994) did groundbreaking work on transformational leadership. Their work built on the foundation of others. While there are variants, Bass' definition of idealized influence, intellectual stimulation, inspiration, individualization appears widely in literature. Research-based tools to measure TL include the MLQ and Five-Factor personality test.

Summary

This chapter examined literature on engagement, emotional intelligence and transformational leadership, including history, antecedents, definitions, and elements. This chapter also reviewed popular tools used to measure the outcomes and effectiveness of employee engagement, emotional intelligence, and transformational leadership. This chapter concluded with a summary discussing the relationship between these elements and their impact on procurement staff development based on current literature. Based on the research contained here, in Chapter 2, it is conceivable that current procurement managers may leverage these concepts in their efforts to develop employees.

Chapter 3: Research Design and Methodology

Introduction

Chapter 3 discusses the research design and methodology employed to examine the best practices of procurement managers to develop staff for the 21st century. The initial section of Chapter 3 contains a restatement of the research questions. Next appears a discussion concerning the nature of the study including strengths, and weaknesses. Following the nature of the study is a section on the study methodology, inclusive of the structured process of phenomenology and the appropriateness of this method for the research project. A discussion of the strengths and weaknesses of the phenomenological approach appears as well.

The research design section includes information on the analysis unit that the researcher interviewed. Also included is information on the study's population. A discussion of the sample size appears as well. Discussion of the sampling approach, participation selection, and sampling frame also appear in the research design section. Finally, the research design section highlights the approach used to ensure maximum variation in the sample, including details on the criteria of inclusion and exclusion.

Chapter 3 also reviews the protection of human subject information as required by the Institutional Review Board (IRB). Also covered are the data collection methodology, interview techniques and the interview protocol. A table highlighting the relationship between the research and interview questions is also included. Finally, Chapter 3 reviews the validity of the study, including prima-facie, content, peer, and expert review approaches. A statement of personal bias, including the use of bracketing and epoche to facilitate objectivity, is included as well. The data analysis section reviews steps taken to improve both the reliability and validity of the coding and the research study in general.

Re-Statement of Research Questions

This section describes the research methods applied to achieve the objectives of the study. The primary method was to obtain answers from procurement managers to four research questions:

RQ1: What strategies and practices do current procurement managers use to develop employees?

RQ2: What challenges do procurement managers face in their efforts to develop employees?

RQ3: How do procurement managers measure and track success in developing employees?

RQ4: What recommendations would current procurement managers give the future generations of procurement managers in developing employees?

Nature of the Study

This study on best practices to develop procurement talent for the 21st century employed a qualitative research design. "Qualitative research is a situated activity that locates the observer in the world. Qualitative research consists of a set of interpretive, material practices that make the world visible" (Denzin & Lincoln, 2018, p. 10). Denzin and Lincoln (2018) further elaborate, "Qualitative researchers study things in their natural settings" (p. 10) and interpret these conversations, artifacts, and data, to present a phenomenon to the world. The qualitative researcher must be aware of their own viewpoint, and thereby make efforts to maintain objectivity throughout the inquiry process. Creswell (2013) notes that "the final written report or presentation includes the voices of participants and the reflexivity of the researcher…" (p. 44). Through employment of a qualitative research design, this study on procurement talent

development for the 21st century could make visible the participant's perspective. Guided by relevant literature, as interpreted by the researcher, this study could contribute to the body of knowledge by providing insight into procurement talent development best practices during a demographic shift in the early 21st century.

Therefore, the purpose of this study was to uncover the best practices used by today's procurement leaders to develop the next generation of talent. Literature pertaining to procurement and talent development helped to develop a baseline for the qualitative design employed. Interviews, notes, and memos could broaden the body of knowledge and help to frame the analysis. Peer review served to guide the interpretation of the data to minimize researcher bias. A review of the philosophical assumptions guiding this study appears below.

There are four philosophical assumptions generally used by researchers for qualitative studies. Creswell (2013) states these assumptions "are beliefs about ontology (the nature of reality), epistemology (what counts as knowledge and how knowledge claims are justified), axiology (the role of values in research), and methodology (the process of research)" (p. 19). From ontology, we deduce that each subject in a study lends a unique perspective or reality to the research. The epistemological assumption leads a researcher to conduct the study in a field setting to observe the participants in their natural environment in order to gain first-hand knowledge of a phenomenon. The axiological assumption causes researchers to discuss their own values and biases as well as those of the study subjects and the impact of those values on the study findings. The methodology of a qualitative study is "from the ground up" (Creswell, 2013, p. 17), and shaped by the research process. While theoretical factors are important, inferences drawn from the research will shape the study as the investigator may alter the data collection

approach to accommodate modified research questions if necessary. The four philosophical assumptions are foundational to interpretative frameworks that affect the research process.

Terms that describe a researcher's philosophical assumptions include both "a paradigm (Guba, 1990, p. 17) and interpretive framework" (Denzin & Lincoln, 2018, p. 27). A working definition of paradigm or interpretive framework is "a basic set of beliefs that guides action" (Guba, 1990, p. 17). The list of interpretative frameworks that guides qualitative research is ever expanding (Creswell, 2013). There are various categorizations of interpretative frameworks including positivism, postpositivism, critical theory and social constructivism. A brief outline of each of these frameworks appears below.

Positivism is a framework that espouses the researcher, through empirical experimentation, can mitigate most of the researcher bias and approximate "how things really are" (Guba, 1990, p. 19). From an ontological perspective, the positivist believes that there exists a true reality, unchanging over time. This true reality is due to natural laws and immutable cause and effect relationships. Through careful epistemology and rigorous methodology, the positivist believes they can discover and document the true reality (Guba, 1990). Shortcomings of the positivist perspective include an imperfect humans' ability to interpret properly reality, and the notion that humans can fully eliminate personal bias from research. Postpositivism was an effort to address these shortcomings.

The postpositivist approach applied critical realism to positivism, through the acknowledgment of a human's inability to perceive correctly the true reality through imperfect senses (Guba, 1990). While still supportive of the theory of the existence of a true reality, postpositivism addresses the shortcomings of man, to discern reality, and to be completely unbiased in the interpretation of it. The postpositivist perspective advocates the use of multiple

data sources and methods to help mitigate human frailty and bolster confidence in the objectivity

of research. The postpositivist approach also strives to correct as many as four additional

disparities of the positivist approach including "the imbalance between rigor and evidence"

(Guba, 1990, p. 21), "precision and richness" (Guba, 1990, p. 22), "elegance and applicability"

(Guba, 1990, p. 22), and discovery and verification (Guba, 1990, p. 22). A postpositivist will, at

times use a quantitative research structure to frame their research reports (Creswell, 2013). One

shortcoming of the postpositivist approach is that the researchers still introduces their inherent

bias into the inquiry. The development of critical theory was in part an effort by multiple

societal elements to tell their stories from their own perspectives, free of the bias of outsiders

(Guba, 1990).

Critical theory proponents seek to overcome limitations and stereotypes often placed on

oppressed groups by the broader society (Fay, 1987). Critical theory includes race, gender,

sexual orientation, and political perspective research. Critical theory-based research

encompasses the unique perspective that diverse individuals and groups bring to a research

inquiry. The end goal of the critical theory approach can include an effort to understand or

transform the social order within a nation or group (Creswell, 2013). Although critical theory

does broaden the perspective of research as a discipline through the inclusion of additional

paradigms on social order, it does not fully address the inherent bias of any particular group or

individual in a research study.

Social constructivism is a research paradigm that positions both the researcher and the

subject within the research framework to help mitigate researcher bias. The social constructivist

interpretive framework lends itself to the development of a relativist view of the social world

(Denzin & Lincoln, 2018). The researcher acknowledges personal bias and the impact it has on

the inquiry. The researcher also recognizes the importance of context in the interpretation of study findings. The findings incorporate the results of the interaction between the researcher and the subject (Guba, 1990). Reality is not absolute, but as a construct of the subjects from their frame of reference. Unique constructs derived from individual perspectives receive interpretation, discussion, and synthesis to develop a construct approaching a consensus (Guba, 1990). Constructivism encourages the use of many voices and perspectives to arrive at a viewpoint (Denzin & Lincoln, 2018). It builds on the practical application of insights gained through the interpretation of multiple perspectives of those who lived through a particular experience.

Each of the interpretive frameworks outlined above has strengths and weaknesses. Over time, the progression of these paradigms began to address the weakness in each framework. Initially, qualitative research, in general, was less scientific than quantitative research according to many (Denzin & Lincoln, 2018). The positivist approach employed scientific methods that began to address concerns about a non-quantitative approach (Creswell, 2013). The transition from a positivist to postpositivist lens by some researchers was an effort to address human imperfection, bias and the impact of each on research findings in qualitative methods (Guba, 1990). Critical theory went a step further to ensure the inclusion of additional perspectives from cultural, political, gender and other affinity groups in research studies (Guba, 1990). The constructivist and social constructivism frameworks moved toward full recognition of the relative perspectives of both subject and researcher, the interaction of these views, and the effect on research findings (Creswell, 2013; Denzin & Lincoln, 2018). Further examination of the strengths and weaknesses of a qualitative research approach appear below.

Strengths of qualitative research include the level of depth and examination of the subject matter (Anderson, 2010). Qualitative research also facilitates managing and simplifying data while retaining their integrity (Atieno, 2009). The qualitative approach provides flexibility and allows the research to modify researcher questions and frameworks as the study evolves (Denzin & Lincoln, 2018). Nuances in the data and research subjects emerge that may are not as clear to see in other research methods (Anderson, 2010). In addition, data is specific to a particular context, which limits over generalization of results (Anderson, 2010).

Weaknesses of qualitative research include significant reliance on the skill of the researcher (Anderson, 2010). Data analysis can be time intensive, with conclusions laden with researcher bias (Denzin & Lincoln, 2018). In addition, there may be a loss of reliability due to transcription or other errors (Atieno, 2009). In some circles, even when appropriate to the inquiry, qualitative research still is not as accepted as quantitative research (Anderson, 2010).

Methodology

When employing a qualitative research design from a social constructivism framework, it is important to choose an approach that fits the research topic. This study sought to uncover shared experiences from the participants to derive a common understanding of employee development strategies, practices, challenges, success metrics for procurement leaders. Application of inductive and deductive reasoning to the research helped to derive a collective view of these experiences. In essence, this study examined a phenomenon to gain a collective perspective on procurement talent development. Below is a further discussion of the phenomenological approach and structured process that will guide the study.

Structured process of phenomenology. The phenomena in question are the experiences of managers developing the next generation of procurement talent. The collection of data on

these experiences was through an interview using open-ended questions. From the data

collected, a complex and composite collective view could come about. Moustakas (1994) also

states that the phenomenological approach leverages experience to develop an overall description

as a foundation to discern the essence of the experience. It is important that the researchers take

note and state their personal perspective in order to mitigate the impact of personal bias

throughout the process (Creswell, 2013). Given the goals of the research, phenomenology

seemed fitting.

        Appropriateness of phenomenology methodology. Creswell (2013) states

"Phenomenologists focus on describing what all participants have in common as they experience

a phenomenon…" (p. 76). Coding will help to uncover shared phenomena from the experience

of the participants through the perspective of the researcher (Moustakas, 1994). The collective

view of shared phenomena will serve to frame best practices. Therefore, a phenomenological

approach was appropriate to the goal of the study.

        One strength of the phenomenological approach is the flexibility to modify the research

questions to follow-up on inferences gained during the study (Creswell, 2013). An additional

strength is the ability to examine unique perspectives on a phenomenon from diverse viewpoints

(Creswell, 2013). Another strength is the depth of insight possible with the phenomenological

approach as compared to other approaches (Creswell, 2013).

        However, there are inherent weaknesses of the phenomenological approach as well.

First, the researcher must carefully choose that participants, so that a collective picture can be

identified (Creswell, 2013). In addition, the interpretive lens of the researcher may introduce

bias into the analysis. As a result, the researcher must be transparent about the philosophical

assumptions made that underpin the research. An additional weakness is the chance that the

researchers may assert themselves incorrectly into the study through a flawed approach

(Creswell, 2013). In summary, the research design should factor in the appropriateness,

strengths and weakness of the phenomenological approach to optimize the validity and reliability

of the study.

Research Design

Research design involves a focus on the research questions, the purpose of the study, the

information that most appropriately answers specific research questions, and the most effective

strategies are most effective for obtaining the data (Denzin & Lincoln, 2018). The research

design should consider relevant literature and discuss placement of the researcher in contact with

the subjects. A discussion of the subject for the study appears below.

Analysis unit. The unit of analysis for this study is a Procurement Manager. The

procurement manager met the following qualifications:

1. Direct supervisory experience of a team of at least five procurement personnel
   within the last two years;

2. A minimum of two years of experience in the supervisory role;

3. A minimum purchase amount of $10 million in goods and services annually
   during the qualifying time frame;

4. Active involvement in procurement, mentoring, training and other forms of
   development.

Population. The population was from the Southern California chapter(s) of procurement

member organizations inclusive of individual members. A search on Google.com for best supply

chain associations generated a list of potential organizations. The scope was United States (U.S.)

based organizations, with well-reviewed trade shows and member certification tests. Also, one

federal government-centered organization and one state government centered organization were chosen for overall participant diversity. The analysis resulted in the selection of the following organizations:

1. Association for Supply Chain Management (APICS) – Originally known as the American Production and Inventory Control Society, APICS began in 1957. APICS mission is "fostering the advancement of end-to-end supply chain management through a body of knowledge, innovative research, systems, and methods to create value for customers, members and organizations." (Association for Supply Chain Management [APICS], 2018, para. 8). APICS has over 45,000 members globally and nearly 300 corporate members (Association for Supply Chain Management APICS, 2018);

2. Institute for Supply Management (ISM) – ISM is a large supply management non-profit organization with offices around the world. ISM has over 50,000 supply management members globally (Institute for Supply Management [ISM], 2018);

3. National Contract Management Association (NCMA) -- A United States-based organization, dedicated to federal contract management with over 20,000 members nationally (National Contracts Management Association [NCMA], 2018);

4. The Institute for Public Procurement (NIGP) – Formerly known as the National Institute of Governmental Purchasing, NIGP represents over 3,000 governmental agencies with over 15,000 members (Institute for Public Procurement [NIGP], 2018). The NIGP "mission is to develop, support and promote the public procurement profession" (NIGP, 2018, para. 2).

5. Council of Supply Chain Management Professionals (CSCMP) – Since 1963, CSCMP provides professional networking, career development and education to the supply chain community. (Council of Supply Chain Management Professionals [CSCMP], 2018).

The Southern California chapters of the membership organizations listed above received a request to provide the contact information for their corporate representatives. The membership organizations received either a phone call, e-mail or in person visit using the script in letter of introduction (see Appendix A). Each corporate membership representative received contact via either phone call, e-mail, or in person using the script in the letter of introduction (see Appendix B) Ultimately, a master list of procurement managers received either a phone call, e-mail or in person contact using the script in letter of introduction (see Appendix C).   For procurement managers who agreed to participate, each received, reviewed, and signed the informed consent form (see Appendix D).

In addition, several of the membership organizations list their corporate members on their public website. In cases where there was a public membership list, it helped to discern which organizations were in Southern California. Corporate procurement representatives listed publicly from organizations headquartered in Southern California received contact via phone, email or in person using the script in letter of introduction (see Appendix B).   Ultimately, a master list of procurement managers received either a phone call, e-mail, or in person visit using the script in letter of introduction (see Appendix C). For procurement managers who agreed to participate, they received, reviewed, and signed the informed consent form letter (see Appendix D).

Finally, Linkedin.com was used to reach out directly to procurement managers from corporate members of the membership organizations as listed. These individuals received a phone call, e-mail or in person visit using the script in letter of introduction (see Appendix C). For procurement managers who agreed to participate, each received, reviewed, and signed the informed consent form letter (see Appendix D). The combination of methods listed above ensured a sufficient number of participants for the research project.

Sample size. An examination of research literature helped to determine an appropriate sample size. From an analysis of 560 qualitative studies from theses.com, Mason (2010) found that the mean sample size was 31. However, Mason (2010) also noted that the distribution had a statistically significant number of studies with multiples of ten. Creswell discusses multiple variations in phenomenological sample size with recommendations ranging from one up to 325 (Creswell, 2013). He recommended sampling "20 to 30 individuals" (Creswell, 2013, p. 157) and implied that five to 25 was appropriate for a phenomenological study. Morse (1994) said, "At least six samples are necessary" (p. 225). Dukes (1984) suggests between three and 10 participants. Creswell (2013) noted that the sample should be sufficient to discern a common perspective. After review of the literature, the researcher will interview 15 to 30 procurement managers inclusive of individuals from both government and non-government supply chain organizations to provide data for analysis purposes.

Purposive sampling. This study employed purposive sampling. Purposive sampling is a subjective non-probabilistic sampling technique where the researcher has in mind the suitability of the subjects for inclusion in the study (Etikan, Musa, & Alkassim, 2016). Such a criterion approach is effective when all participants experienced the same phenomenon (Creswell, 2013).

Denzin and Lincoln (2018) concur, "Purposive sampling is useful to find and choose participants" (p. 653). The participant selection approach appears below.

   Participation selection. Participant selection from the population used a sampling frame. The research design included specific criteria for inclusion and exclusion of participants. Purposive sampling aided to ensure maximum variation in sampling. Discussion of the detailed approach appears below.

   Sampling frame. "A sampling frame is a researcher's operational definition of a population" (Kalleberg, Marsden, Aldrich, & Cassell, 1990, p. 658). Below are the procedures that fostered the creation of a master list complete with full contact information. The master list came from discussions with individuals comprising the population as noted. The approach to develop the master list was as follows:

1. Contacted each of the Southern California chapters of the organizations in the population and requested a conversation with the office manager, President, Executive Director, or other decision makers.

2. Followed up of the conversation or message with an email and letter outlining the study purpose and approach, and requesting the organization's permission to approach members.

3. Secured written permission via e-mail to contact members.

4. Contacted members to secure the agreement of the participants.

5. Contacted individuals who were potential participants.

6. Applied the inclusion and exclusion criteria.

7. Applied criteria for maximum variation.

8. Secured agreement and obtain a signed informed consent form.

9. The process repeated until the achievement of the desired sample size.

10. LinkedIn was an important part of the strategy, and yielded the majority of participants.

11. Microsoft Excel served as the data repository for the master list.

Details on the criteria for inclusion and exclusion and maximum variation are below.

Criteria for inclusion and exclusion. The criteria for inclusion were:

1. Direct supervisory experience of a team of at least five procurement personnel within the last two years;

2. A minimum of two years of experience in the supervisory role;

3. A minimum purchase amount of $10 million in goods and services annually during the qualifying time frame;

4. Active involvement in procurement personnel management, training and development.

5. Membership in the population as noted above.

The criteria for exclusion were:

1. Participants who did not qualify based on the inclusion criteria.

2. Participants who qualified but for any reason were unable or deemed unwilling to participate in the study.

Purposive sampling maximum variation. The notion of maximum variation sampling is to select a broad enough group of participants from the population to facilitate a greater level of understanding (Etikan et al., 2016). Creswell (2013) describes maximum variation samples as an approach that diversifies the participants in a qualitative study. Variations to produce maximum variation in the master list of participants for this study will include industry, company, duration

in the procurement manager role and span of control. The goal is to expand the breadth and depth of information gleaned to develop a more robust study, inclusive of varied perspectives (Creswell, 2013).

Protection of Human Subjects

Given that this study involved human subjects, Institutional Review Board (IRB) standards and protocols were an important consideration. From the Pepperdine University IRB website (Pepperdine University, 2018), note the following:

> The primary goal of the GPS IRB is to protect the rights and welfare of human subjects participating in research activities conducted under the auspices of Pepperdine University. Applications submitted to the GPS IRB generally encompass social, behavioral, and educational research and are usually considered medically non-invasive. The GPS IRB employs a review process in conformity with the Federal Policy for the Protection of Human Subjects (45 CFR 46) and the Federal-wide Assurance (FWA) enacted between Pepperdine University and the Office for Human Research Protections (OHRP) under the Department of Health and Human Services (DHHS). (para. 1, 2)

In compliance with Pepperdine's IRB, submission of an exempt application to IRB was made and approval was obtained prior to the recruiting of research subjects (see Appendix E). The application contained an informed consent form with all recruitment scripts.   Review of the informed consent form by potential participants occurred prior to an interview. The researcher informed prospective participants of the voluntary nature of the study and requested written consent to participate in the study if they were willing to do so.

The form highlights that participants have maximum flexibility and would remain anonymous throughout the process except to the researcher who would maintain confidentiality. In addition, the form contained the following information:

- An overview of the study and procedures;
- Potential benefits of the study to the participants and the supply chain field;
- Potential risks of the study;
- A conflict of interest statement by the researcher;
- Additional rights of the participants;
- Researcher's contact information;
- The contact information of the faculty member supervising the researcher;
- Signature spaces for the participant and principal investigator.

The researcher secured the notes and electronic devices appropriately. There was no financial remuneration to the research participants in conjunction with the study.

Data Collection

Recruitment of interview subjects was by phone and e-mail using an IRB approved script. Once the subject communicated agreement to participate in the research, the researcher set up a convenient time to interview the subject at their office, and electronically transmitted the Informed Consent form and interview questions. The researcher contacted each participant a minimum of two separate occasions prior to the interview to build rapport. In advance of the meeting, the researcher asked for permission to record the interview electronically for the accuracy of information recall. The researcher also informed each participant that the anticipated duration of the interview was approximately one hour.

At the meeting, a review of the Informed Consent form took place. All participants signed the form. The researcher went over the process for the interview and asked the participant if they had any questions or concerns before the interview began. An audio recording of the each interview helped to ensure the accuracy of the transcription of the data. Each company and individual received a unique code known only to the researcher. The researcher reiterated to the subjects the confidentiality measures taken. Upon finalization of the research, all recordings and unique codes for all corporations and individuals were set for destruction. The researcher used both an iPad recorder and a separate recording device at the interview, and had backup writing materials in case of technology failure. All participants agreed to recording of the interviews. Each participant and corporation received an identification number with the key known only to the researcher. Security of electronic recordings was through the maintenance of an appropriate firewall and passwords on all devices. The coded handwritten notes were under lock and key in the researcher's home office.

Interview Techniques

The researcher used a semi-structured interview. According to Whiting (2008), key features of semi-structured interviews include:

- Open-ended, pre-determined questions designed to draw information from participants leading to an in-depth dialogue;

- Personal dialogue to uncover hidden themes and stories;

- Additional questions can emerge from the dialogue;

- Development of a personal approach to the interview process by the researcher, supported by data from the literature review.

Conversely, structured interviews tend to use a closed question format, which is better suited to a quantitative approach where categorization of data is within a structured framework. In addition, structured interviews tend to lack flexibility (Whiting, 2008). Unstructured interviews are more flexible, but yield data that can lead to difficulty in discerning common themes (Whiting, 2008). In summary, the semi-structured interview format strikes the desired balance of flexibility and consistency for phenomenological research, given the relative strengths and weaknesses of each interview approach.

The researcher arrived 15 minutes early for each interview, warmly greeted the participant, and followed the data collection procedures as noted. The researcher self-disclosed relevant information and was transparent in responses to any inquiries to build trust with the participant. In conducting the interview, the researcher employed active listening and observation skills to ensure sensitivity to the participant. No emergencies or rescheduling of interviews occurred. Throughout the interview, the researcher regularly went over the planned semi-structured approach, and periodically noted the time remaining for the interview to stay on schedule.

Interview Protocol

The interview protocol involved the process of developing the interview questions. The interview questions emerged from personal knowledge of the subject material and a review of pertinent literature. In addition, a peer review and an expert review provided additional validation of the research questions. A discussion of each validity approach appears below.

The relationship between research and interview questions: Establishing validity. In order to ensure the validity of the research questions and the study, the researcher undertook additional measures. The researcher used prima-facie, and peer-review validity to refine further

the questions. Subsequently, expert review provided further refinement of the interview questions. A summary of each validity step appears below.

Prima-facie and content validity. Initially, the researcher developed a draft of the proposed research and interview questions based on personal experience. The literature review informed the researcher's initial edit of the proposed questions. After additional reflection, a reconstruction of the questions occurred. The initial relationship between the four research questions and the 14 interview questions is as noted in Table 5.

Peer-review validity. The researcher used a peer review approach to validate further the research questions and content validity. An e-mail sent to multiple peers using the form in Appendix F served as a useful tool to gather peer responses. The incorporation of peer comments appears in Table 6.

Expert review validity. Expert validity came through review of the research questions by a Pepperdine faculty panel of experts. The panel provided additional refinement of the research questions. The incorporation of peer comments appears in Table 7.

Table 5

Research and Interview Questions

Research Questions	Corresponding Interview Questions
RQ1: What strategies and practices do current purchasing managers use to develop employees?	IQ 1: What strategies and practices do you use to develop employees? IQ 2: What steps do you take to implement your strategies and practices to develop employees? IQ 3: What additional elements do you use? IQ 4: How do you overcome employee resistance or opposition to your efforts? IQ 5: What impact (if any) do organizational leadership concepts, such as employee engagement, emotional intelligence or Social Emotional Learning have on your approach to developing employees?
RQ 2: What challenges do purchasing managers face in their efforts to develop employees?	IQ 6: How do you manage the biggest challenges in developing employees? IQ 7: What is the most difficult challenge to overcome? IQ 8: Did anything go wrong you had not anticipated?
RQ3: How do purchasing managers measure and track success in developing employees?	IQ 9: What are the top 3-5 metrics you track to measure success in developing employees? IQ 10: What outcome(s) are you willing to accept? IQ 11: What assistance does your organization give you in measuring and tracking employee development? IQ 12: What factors would you like to measure and track but are unable to do so?
RQ4: What recommendations would current purchasing managers give the future generation of leaders in developing employees?	IQ 13: What is the most important thing in developing the next generation of leaders? IQ 14: What additional factors do you consider as relevant?

Table 6

Research Questions and Corresponding Interview Questions (Peer Reviewed)

Research Questions	Corresponding Interview Questions
RQ1: What strategies and practices do current purchasing managers use to develop employees?	IQ 1: What strategies and practices do you use to develop employees? IQ 2: What steps do you take to implement your strategies and practices to develop employees? IQ 3: What additional elements do you use? ~~IQ 4: How do you overcome employee resistance or opposition to your efforts?~~ Follow up: What impact (if any) do organizational leadership concepts, such as employee engagement, emotional intelligence or Social Emotional Learning have on your approach to developing employees?
RQ 2: What challenges do purchasing managers face in their efforts to develop employees?	IQ 4: How do you manage the biggest challenges in developing employees? IQ 5: What is the most difficult challenge to overcome? IQ 6: How do you overcome employee resistance to your efforts? IQ 7: Did anything go wrong you had not anticipated?
RQ3: How do purchasing managers measure and track success in developing employees?	IQ 8: What are the top ~~3-5~~ metrics you track to measure success in developing employees? (limit them to 3-5 if they went long) IQ 9: What outcome(s) are you willing to accept? IQ 10: What assistance does your organization give you in measuring and tracking employee development? IQ 11: What factors would you like to measure and track but are unable to do so?
RQ4: What recommendations would current purchasing managers give the future generation of leaders in developing employees?	IQ 12: ~~What is the most important thing in developing the next generation of leaders?~~ What lessons have you learned in employee development we have not covered in this interview? IQ 13: What ~~additional factors do you consider as relevant?~~ would you not do over?

Table 7

Research Questions and Corresponding Interview Questions (Expert Reviewed)

Research Questions	Corresponding Interview Questions
RQ1: What strategies and practices do current purchasing managers use to develop employees?	IQ 1: What strategies and practices do you use to develop employees? IQ 2: What steps do you take to implement your strategies and practices to develop employees? IQ 3: What additional elements do you use? ~~IQ 4: How do you overcome employee resistance or opposition to your efforts?~~ Follow up: What impact (if any) do organizational leadership concepts, such as employee engagement, emotional intelligence or Social Emotional Learning have on your approach to developing employees?
RQ 2: What challenges do purchasing managers face in their efforts to develop employees?	IQ 4: How do you manage the biggest challenges in developing employees? ~~IQ 5: What is the most difficult challenge to overcome?~~ IQ 5: How do you overcome employee resistance to your efforts? IQ 6: Did anything go wrong you had not anticipated?
RQ3: How do purchasing managers measure and track success in developing employees?	IQ 7: What are the top ~~3-5~~ metrics you track to measure success in developing employees? (limit them to 3-5 if they went long) IQ 8: What outcome(s) are you willing to accept? IQ 9: What assistance does your organization give you in measuring and tracking employee development? IQ 10: What factors would you like to measure and track but are unable to do so?
RQ4: What recommendations would current purchasing managers give the future generation of leaders in developing employees?	IQ 11: ~~What is the most important thing in developing the next generation of leaders?~~ What lessons have you learned in employee development we have not covered in this interview? IQ 12: What ~~additional factors do you consider as relevant?~~ would you not do over?

Statement of Personal Bias

As with all human beings, researchers bring biases and preconceptions with them even into research projects. According to Moustakas (1994), phenomenology attempts to focus on how things appear, removed from biases. There exists an effort to seek meaning from the experiences of others. Therefore, the researcher should make an effort to set aside personal biases.

Bracketing and epoche. Farina (2014) stated, **"**Phenomenology is the study of phenomena that present themselves to consciousness…it is a 'philosophy based on experience'" (p. 53). With a phenomenological approach, the researcher is experiencing phenomena through the eyes of the subject who lived it. Therefore, a phenomenological approach requires bracketing and epoche on the part of the researcher to set aside personal biases and do their best to describe the lived experience others (Farina, 2014). The principal investigator of this research project:

- Was born in 1959 and raised in the United States;
- Is an engineer with over 20 years of experience in aerospace, manufacturing, and supply chain;
- Has an MBA in finance, a lean six sigma green belt, and a Project Management Professional certification;
- Has a job in supply chain, and works as a talent development consultant.

In order to mitigate personal bias, the researcher mentally formed a blank slate and pedagogical framework during the interview process to remain in observer mode. The researcher made an effort not to view the comments from the subject through the lens of experience, but attempted to live vicariously through the experience and perspective of each subject. The

researcher asked clarifying questions to gain perspective. All of these steps were to bracket the research from bias. Epoche should help to ensure objectivity during the coding and data analysis process.

Data Analysis

Coding is one method of analyzing qualitative data (Saldaña, 2015). In fact, many qualitative studies employ coding but do not discuss coding reliability (Campbell, Pedersen Quincy, & Osserman, 2013). These authors go on to state: "In-depth semi-structured interview data constitute the empirical backbone of much qualitative research in the social sciences" (Campbell et al., 2013, p. 295). Given the semi-structured, in-depth interview approach chosen for this study, it is important to establish a reliable coding approach.

The validity of results is also an important consideration in research (Calder, Phillips, & Tybout, 1982). External validity is the degree to which the study results facilitate generalization to the population outside of the study. A known criticism of qualitative research is that it can lack validity and reliability (LeCompte & Goetz, 1982). In an effort to improve this study's reliability and validity, the researcher used a four-step process to establish inter-rater reliability, thereby improving validity overall (Campbell et al., 2013).

Interrater reliability and validity. The researcher coded the first three interviews personally and had a peer review committee of cohort members from the Doctorate of Education Program at Pepperdine University review the coding of the first three interviews. Collectively, along with the researcher, the group arrived at consensus on the coding approach. If the peer review committee was unable to reach a consensus, the dissertation committee resolved any remaining differences. Once the coding scheme was final, the researcher coded the remaining

interview transcripts. The peer committee continued to offer consultation with oversight by the dissertation committee to resolve differences as necessary.

Summary

Chapter 3 contains a comprehensive and extensive examination of the research design, methodology, and techniques for conducting valid and reliable qualitative research. The chapter begins with an introduction to the topic, the research questions, and a discussion on the qualitative nature of the study. Chapter 3 also contains the research assumptions. The researcher employed a phenomenological approach. Chapter 3 also contains a discourse on the strengths, weaknesses, and appropriateness of the phenomenological approach given the interviews that are a part of the research.

Chapter 3 also highlights the interview subjects. The analysis unit was a procurement manager, from a population comprised of several industry associations. Purposive sampling of the population occurred to develop a sampling frame. Chapter 3 also contains details on both the inclusion and exclusion criteria for the sample and the criteria for maximum variation. Industry and longevity in a procurement manager role also served as factors to both narrow and diversify the final list of subjects.

Chapter 3 also contains a statement from the Pepperdine IRB on the protection of human subjects. The data collection process employed an IRB approved template and an informed consent form for the participants. The researcher obtained written agreement from the participants along with authorization to record the interview. There was a plan to memorialize the data if the subject did not agree to electronic recording.

Chapter 3 also memorializes the interview techniques and protocol. The interviews were semi-structured and validated by a three-step process employing prima facie, peer, and expert

review. Successive revisions of the research and interview questions appear. The first and final list of questions demonstrates the validation activity.

Data analysis rounds out Chapter 3 with a review of coding structures. Unstructured coding was the technique best suited to the study. External validity improved via inter-rater reliability techniques. The researcher coded the first three interviews personally, and have peers check the ratings. Resolution of coding differences occurred iteratively, or with the assistance of the dissertation committee. Coding of the remaining interviews used the agreed-upon approach.

Chapter 4: Findings

Given the rapid pace of change in global procurement practices, policies, and tools, organizations are wrestling with how to best develop procurement talent for the 21st century (Umbenhauer et al., 2018). While organizations and industry experts are making progress in addressing talent development challenges, they are inconsistent in their effort to do so (Harrington, 2015; Umbenhauer et al., 2018). Experts cite multiple challenges to prepare staff adequately, including shortcomings in emotional intelligence, technical proficiency and other necessary skills (Harrington, 2015; Ruamsook & Craighead, 2014). Therefore, in an effort to provide insight into current practices employed to address staff development needs, this study sought after procurement leaders to discern how they approach talent development within their organizations. Based on the feedback from these procurement leaders, this document will memorialize their talent development best practices by answering the four research questions below:

RQ1: What strategies and practices do current purchasing managers use to develop employees?

RQ2: What challenges do purchasing managers face in their efforts to develop employees?

RQ3: How do purchasing managers measure and track success in developing employees?

RQ4: What recommendations would current purchasing managers give the future generation of leaders in developing employees?

The four research questions informed the development of twelve interview questions, designed to capture pertinent data from the procurement managers participating in the study.

Inter-reliability and validity techniques aided the refinement of the interview questions, and helped to yield the final version of the interview questions, which is:

1. What strategies and practices do you use to develop employees?

2. What steps do you take to implement your strategies and practices to develop employees?

3. What additional elements do you use? Follow up: What impact (if any) do organizational leadership concepts, such as employee engagement, emotional intelligence or Social Emotional Learning have on your approach to developing employees?

4. How do you manage the biggest challenges in developing employees?

5. How do you overcome employee resistance to your efforts?

6. Did anything go wrong you had not anticipated?

7. What are the top metrics you track to measure success in developing employees? (limit them to 3-5 if they went long).

8. What outcome(s) are you willing to accept?

9. What assistance does your organization give you in measuring and tracking employee development?

10. What factors would you like to measure and track but are unable to do so?

11. What lessons have you learned in employee development we have not covered in this interview?

12. What would you not do over?

The study participants provided answers to these specific questions and additional detail through a constructive dialogue. The flow of each interview was unique to the participant, as the

conversational approach employed served to help each share their personal perspective on the questions. The recording of each interview helped to foster accuracy in the transcription and data analysis process. Through analysis and coding of the answers, the data yielded insight into common themes and best practices employed by procurement managers to develop talent.

Additional detail on the study's participants, data collection, and data analysis processes appear in this chapter. In addition, an overview of the inter-rater review process employed for the coding appears. A display of the data for each interview questions appears as well, in both graphical and paragraph form. Finally, a tabular summary of the themes for each of the research questions appears in the chapter summary.

Participants

Five procurement membership organizations and 27 individuals sourced through LinkedIn received a request to participate in this study. These efforts yielded the 15 study participants. Participants in this study ranged in procurement experience from five to 35 years. The participants represented three levels of management – supervisors who manage buyers, managers who manage supervisors, and executives who manage managers. Seven supervisors, four managers, and four executives participated in the study. The participants were from six different corporations representing five separate industries. There were six female and nine male participants.

Common themes across the participants began to emerge during the data analysis. After the12th interview, it appeared no new themes emerged. Three additional participant interviews aided to demonstrate that no new themes emerged. Therefore, 15 participants provided sufficient evidence of data saturation (Saldaña, 2015).

Data Collection

Data collection began the week of February 4, 2019, after obtaining IRB approval on January 22, 2019 (see Appendix E). The initial effort was an internet search for contact information for procurement membership organizations, including the Association for Supply Chain Management (APICS), the National Contracts Management Association (NCMA), the Institute for Supply Management (ISM), the Institute for Public Procurement (NIGP), and the Council of Supply Chain Management Professionals (CSCMP). Given the preference to conduct in-person interviews with the research subjects, the research focused on the Southern California chapters of the procurement membership organizations. Contact by email or phone with Southern California chapters of all five organizations occurred, resulting in solid leads from NCMA San Gabriel Valley and ISM Los Angeles. The researcher is a member of both organizations. Through referrals from the Executive Director/President of each chapter, six research subjects who met the selection criteria, agreed to participate. NIGP also responded, but produced no leads. There was no response from APICS and CSCMP.

Additional participants came from a search on LinkedIn for procurement manager. LinkedIn gave two options, *in jobs* and *in people*. The *in people* option yielded a list of 1,000 individuals, most of who had titles containing phrases such as Procurement Manager, Director of Procurement, and Executive Procurement Manager. Given the preference to conduct in-person interviews, procurement managers employed at firms located in Southern California comprised the portion of the master list developed from LinkedIn. Over 50 procurement managers were initial targets. The list was further refined to target firms and individuals from multiple industries where procurement managers post contact information publicly, attend industry membership organizations, or were familiar to the researcher. The refinement generated a list of

27 individual targets who received emails. Three individuals declined to participate, and

fourteen did not reply. Ultimately, nine participants, who met the selection criteria, came via

LinkedIn.

All participants who agreed to interviews received the informed consent form and

research questions prior to the interview. A detailed explanation of the informed consent form

and research process occurred at the outset of each interview. Through dialogue, the potential

participants were encouraged to ask questions about the research, the process, and the interview.

Ultimately, all 15 participants signed the consent form and consented to the interview. The

consent form, and the subsequent discussion of the consent form, both highlighted the steps

taken to help ensure the anonymity of all participants and their comments. The condition of

anonymity in part helped the participants feel comfortable to provide candid answers to the

interview questions.

Table 8

Participants and Dates of the Participant Interviews

Participant Number	Procurement Role[1]	Date
1	Manager	2/14/2019
2	Manager	2/13/2019
3	Manager	2/13/2019
4	Supervisor	2/19/2019
5	Supervisor	2/21/2019
6	Supervisor	2/14/2019
7	Executive	2/20/2019
8	Manager	2/20/2019
9	Supervisor	2/21/2019
10	Supervisor	2/22/2019
11	Supervisor	2/27/2019
12	Executive	3/08/2019
		(continued)

Participant Number	Procurement Role[1]	Date
13	Executive	3/15/2019
14	Supervisor	3/22/2019
15	Executive	4/12/2019

A 60-minute interview was the initial plan for each participant. In reality, the interviews ranged in length from 32 minutes to 67 minutes. The average length of the interview was 46 minutes. The interviews were conversational. The interview questions blended into the conversation, which flowed from the participant's responses. Table 8 gives the dates of the interviews. The roles of the participants are as follows: Supervisors manage buyers directly. Managers manage supervisors. Executive manage managers. Some managers and supervisors managed buyers directly as well, but most supervision followed a defined hierarchy.

Data Analysis

"Coding labels segments of data with terms to summarize, categorize and account for these segments" (Denzin & Lincoln, 2018, p. 424). The approach to coding for this phenomenological research study involved a blend of In Vivo or "literal" coding (Saldana, 2009, p. 105) and the use of descriptive terms to summarize and categorize statements from participants (Saldana, 2009). In order to ensure the accurate capture of each participant's perspective, the researcher recorded the interviews, and jotted notes to highlight key ideas for follow up questions. In the follow-up questions, the researcher stated his understanding of the initial answers, and asked for additional clarification to ensure the recording reflected a mutual understanding of the subject's perspective.

An automated tool, Trint, transcribed each recording initially, followed by a detailed editing of the Trint generated Microsoft Word file to ensure accuracy. Removal of all personal

and corporate specific data also occurred during the editing of the Microsoft Word file to maintain confidentiality. Next, the utilization of a coding matrix spreadsheet, developed in Microsoft Excel, provided a framework to record both the interview questions and all responses for analysis. Examination of the transcript from each interview facilitated the entry of data into the coding matrix. The transcripts provided key quotes and phrases, and aided in the derivation of themes from the participant's comments. Each column in the matrix contained answers to the same question from the participants. The columns facilitated the analysis and coding of each response to look for similarities in the data.

Upon completion of the coding, further derivation of shared ideas and themes across the participants occurred. The reoccurrence of similar ideas and concepts was an important factor in the analysis, with repeated notions grouped together, and the frequency noted. Theme names came from both direct participant quotes and descriptive language from the researcher, informed by the literature review. The coding matrix, themes, and grouping of ideas wad delivered to two other doctoral students to conduct an inter-rater review.

Inter-Rater Review Process

In an effort to improve this study's reliability and validity, the researcher used a four-step process to establish inter-rater reliability, thereby improving validity overall (Campbell et al., 2013).   Two peers enrolled in the Doctor of Education in Organizational Leadership (EDOL) program at Pepperdine University's Graduate School of Education and Psychology (GSEP) conducted the inter-rater review to ensure coding validity. Through Pepperdine's EDOL program, both students studied research methods and data analysis techniques, which they employed in the inter-rater process. In addition, both students are also using the

phenomenological research approach in their own studies. As a result, they have familiarity with the coding process.

The doctoral students reviewed the research and interview questions, edited transcripts, coding matrix, and code key. They memorialized their initial thoughts in handwritten notes on the code key and the transcripts. Upon further reflection, the researcher modified the code key based on their recommendations, and had follow up dialogue with the doctoral students. Collectively, the doctoral students made seven recommendations resulting in changes to the coding key. The recommendations and changes appear in Table 9.

Table 9

Inter-Rater Coding Suggested Modifications

Interview Question	Theme/code	Inter-rater Recommendations	Modification
1	Individualization	Add separate category for motivation or move these into more appropriate theme	Re-categorized several occurrences as Inspirational Motivation
1	Succession planning	Broaden to workforce planning to capture other similar efforts	Incorporated succession planning into broader workforce planning theme
2	Training	Split into components including formal training, developmental assignments and manager refresher classes	Split code into suggested components
4	Time management	Broader issue is resource management including use of time. Resource availability is a corollary concept in the transcripts	Changed time management to resource management
5	Individual consideration	Flush out provide candid and timely feedback as a separate category	Re-categorized several occurrences as provide candid feedback
5	Performance Metrics	Several items should be recoded as provide inspirational motivation	Recoded items as inspirational motivation
7	Benchmarking	Incorporate into performance metrics code	Moved into theme titled performance metrics

Data Display

The research questions and corresponding interview questions appear in the following sections. Presentation of the key themes and concepts appear in both graphical and paragraph

100

form for each interview question. The graphical representations also note the frequency with

which the themes occurred to help readers visualize the results. Direct quotes from participants

for each theme appear as well, to provide the reader insight into comments from the interviewees

themselves. The numbering of participants as P1 through P15 helped to maintain the anonymity

of each and their corresponding corporations. Research Question 1 and the corresponding

interview question results are in the next section.

Research Question 1

The first research question (RQ1) queried, "What strategies and practices do current

purchasing managers use to develop employees?" Three interview questions were the basis for

inquiry with the participants to derive an answer to RQ1. Each Interview Question (IQ) tied

RQ1 and were as follows:

IQ 1: What strategies and practices do you use to develop employees?

IQ 2: What steps do you take to implement your strategies and practices to develop

employees?

IQ 3: What additional elements do you use?

Follow up: What impact (if any) do organizational leadership concepts, such as

employee engagement, emotional intelligence or Social Emotional Learning have on your

approach to developing employees?

Examination of the participant's responses occurred in order to look for similarities in

order to derive an answer for RQ1. Multiple respondents did not strongly differentiate between

the strategies and practices of IQ1 and the implementation steps of IQ2. IQ3 gave respondents

an opportunity to mention any omissions to their response to IQ1 and IQ2. As a result, there

exists overlap of concepts and ideas captured in participant responses to IQ1, IQ2, and IQ3.

Interview question 1. "What strategies and practices do you use to develop employees?"

The examination of the participant's responses to IQ1 resulted in 49 concepts grouped into six themes. The themes that emerged are as follows: (a) transformational leadership, (b) training, (c) emotional intelligence (EQ), (d) resources and tools, (e) succession planning and tactics, and (f) emotional safety (see Figure 1). An explanation of the concepts grouped in each theme appears in Figure 1.
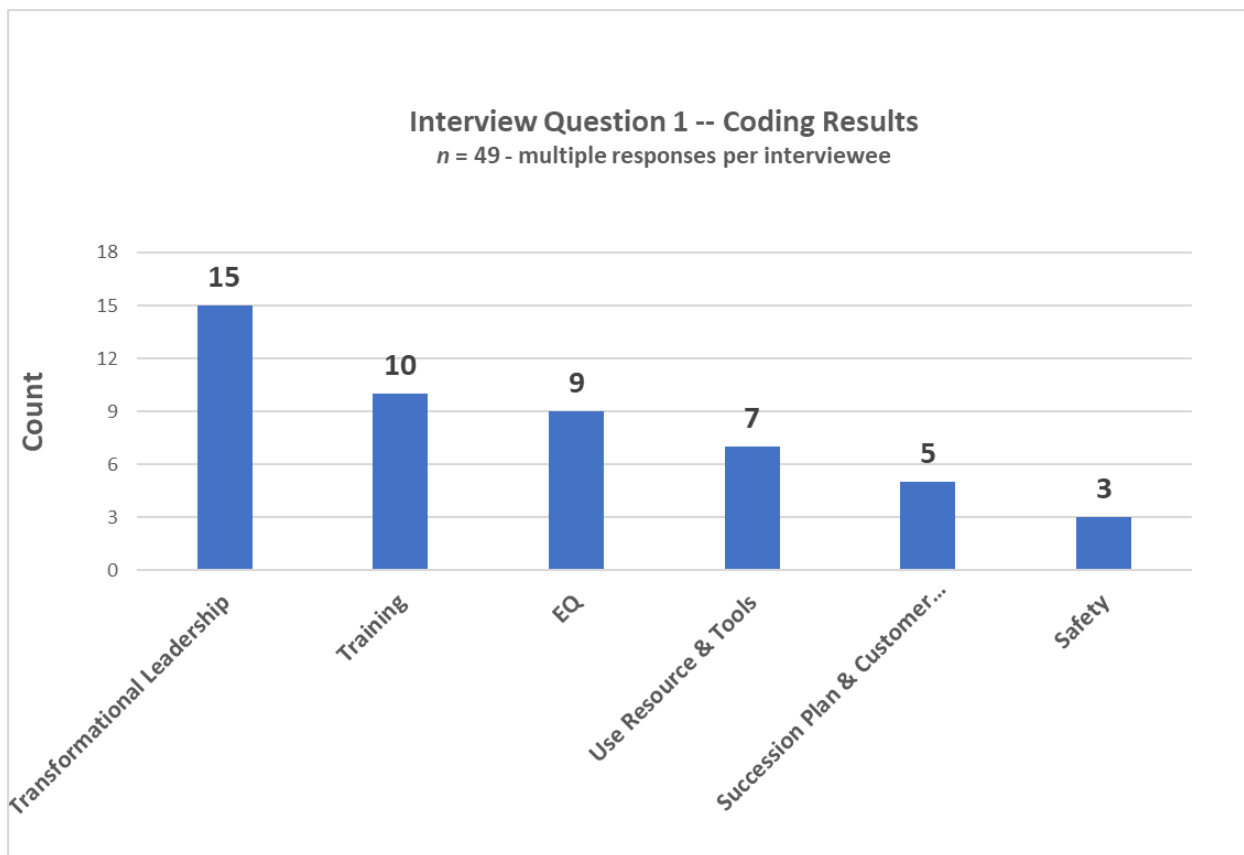
Figure 1. Strategies and practices to develop employees.

Note. The figure highlights six themes derived from answers to IQ1. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

Transformational leadership. The transformational leadership (TL) grouping included comments on individualization, personal example, inspirational motivation, coaching and efforts to inspire consistent with the definition of TL (Bass & Avolio, 1994). Birasnav (2013) noted the

positive impact of a transformational leadership style on teamwork and supply chain outcomes in his work. From their research, Mena, Van Hoek & Christopher (2014) stated that procurement leaders should adopt a transformational leadership style. Interestingly, none of the leaders in this current examination of talent development best practices, *Doing It Right: Procurement Talent Development for the 21st Century,* said, "I'm a transformational leader." Yet the behaviors described fell neatly into categorization as transformational leadership: idealized influence - leading by example; individual consideration - customizing a leadership approach to fit the individual; and inspirational motivation - attempting provide a compelling vision aligned with company goals (Bass & Avolio, 1994). Fifteen or 30.6% of the 49 concepts in response to IQ1 fell in the TL category. The most frequent subcomponent was the importance of assessing the needs of workers individually. Six of the 15 responses dealt with individualization. Six additional comments referred to the importance of the leader's personal example. For example, P4 said, "We develop a custom plan with each individual" and, P13 said, "I set a personal example of development to encourage their development." Three comments mentioned efforts to inspire workers around corporate goals. Nine of 14 participants made comments categorized as transformational leadership.

Training. The training grouping included both formal classroom settings in addition to exposure to learning opportunities through certification classes, mentorship and special project assignments. At some point in the interview, all participants talked about training centered on technical skills and typically offered in a formal setting or project. Most mentioned certification from one of the membership organizations noted earlier as a part of their training approach. Many also discussed in-house technical training materials developed to capture nuances to their organization's processes and approach. Of the 49 ideas, ten or 20.4% of the responses to IQ1

were training related. Of note were the various forms of training employed. For example, P13

mentioned, "We provide coaching, lunch and learns and classes." P11 said "…we have quiet

hours and lots of training materials, and coaching."

     EQ. Emotional intelligence or EQ comprised nine of the 49, or 18.4% of the notions

shared in response to IQ1. From research, the definition of emotional intelligence evolved over

time as multiple investigators put forth various theories supported by research (Gayathri &

Meenakshi, 2013). In his writing *Frames of Mind*, Gardner (1983) defined [emotional]

intelligence as the ability to solve problems or to fashion products within a cultural context. The

work of Salovey & Mayer (1990) built upon earlier work on social or personal intelligences by

Gardner (1983). Goleman's framework, builds on Salovey & Mayer's (1990) concepts. For the

purpose of consistency, the definition of EQ applied to the participant's responses appears in

Table 10, and builds upon the work of Goleman, (2014, 2018), with a framework provided by the

Hay Group (2011).

Table 10

ESCI Abilities and Competencies Map

Ability	Emotional Competency
1. Self-awareness	Self-awareness
2. Self-management	Self-control Goal orientation Perspective and outlook Adaptability
3. Social awareness	Empathy Social awareness
4. Relationship management	Influence others through: Coaching Mentoring Conflict resolution Inspiration Teamwork

The remaining references to EQ will refer to Table 10. Table 10 is how the Hay Group (2011) defines emotional intelligence in order to measure it. The Hay Group uses the Emotional and Social Competence Inventory (ESCI) 360-degree survey to measure emotional intelligence. The ESCI derived from the Hay Group's work with Goleman (2018) and others. Table 10 derives from content in the Hay Group's ESCI User Guide (2011), which contains the updated definition emotional intelligence and its components.

Several participant responses noted EQ or EQ elements. For example, P10 stated "…and third is to help them with their EQ. To help them get there and understand the culture." P12 stated "we promote teamwork and working with engineering to understand where they are coming from." P13 mentioned, "It's the responsibility of the manager to coach the individual on the process." Across all twelve research questions, emotional intelligence appears as a frequent response as part of the overall talent development approach.

Use resources and tools. The use resources and tools grouping included comments on equipping others to do the job through tools, or effective corporate resource management. Seven or 14.3% of the 49 concepts in response to IQ1 fell in the use resources and tools category. Time is a valuable resource that participants actively work with staff to manage in order to foster development. Several participants noted the need to help staffers effectively manage time. Another resource multiple respondents mentioned was the use of Individual Development Plans (IDP) as part of the staff development process. The need to have a tool to manage and focus staff activities was an important practice. Other respondents spoke of in-house tools used for a similar talent development purpose. For example, P4 said, "We develop a custom plan with each individual." Moreover, P7 said, "We have to effectively manage the corporate resource within our organizational constraints to develop people."

Succession planning and customer focus. Succession planning comprised five of 49, or 8.7% of the notions shared in response to IQ1. Some leaders were acutely aware and conversational about the need to develop staff with an eye toward succession. Other leaders did not mention succession at all. Most leaders were aware of a generational shift, but not all addressed it from a succession planning standpoint in their comments. Some leaders did not consider strategy as a factor, or success planning, but placed great emphasis on tactics and day-to-day concerns. Other responses include topics such as strategy vs. tactics, and directive leadership. Direct quotes in this category include an indication from P6 that, "I don't look at employee development as a strategy. It is something I do every day." P8 said, "I work with my [leaders] to look at employee development from a succession planning standpoint."

Safety. Safety comprised three of 49, or 6.1% of the concepts shared in response to IQ1. Safety, although a small grouping, appears separately as a subcomponent of employee engagement. Research on employee engagement informed the study on procurement talent development best practices. The researcher documented safety separately as informed by research from the literature review. Employee engagement research spoke to the importance of safety, e.g., feeling cared about to organizational performance (Harter et al., 2010). The Harter et al. (2010) study noted the impact of employee work perceptions overall on organizational performance. From Kahn's (1990) work on employee engagement, the definition of safety is freedom to be authentic in the work without fear of negative consequences. A few managers mentioned safety related tactics employed with staff members. For example, P2 said, "I work to get them comfortable to talk to me about everything." P5 said, "I have to make it safe for them to learn by doing."

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Interview question 2. "What steps do you take to implement your strategies and practices to develop employees?" The examination of the participant's responses to IQ2 resulted in 43 concepts grouped into five themes. The themes that emerged are as follows: (a) training, (b) coaching, (c) mentoring, (d) transformational leadership, and (e) feedback (see Figure 2). An explanation of the concepts grouped in each theme appears in Figure 2.
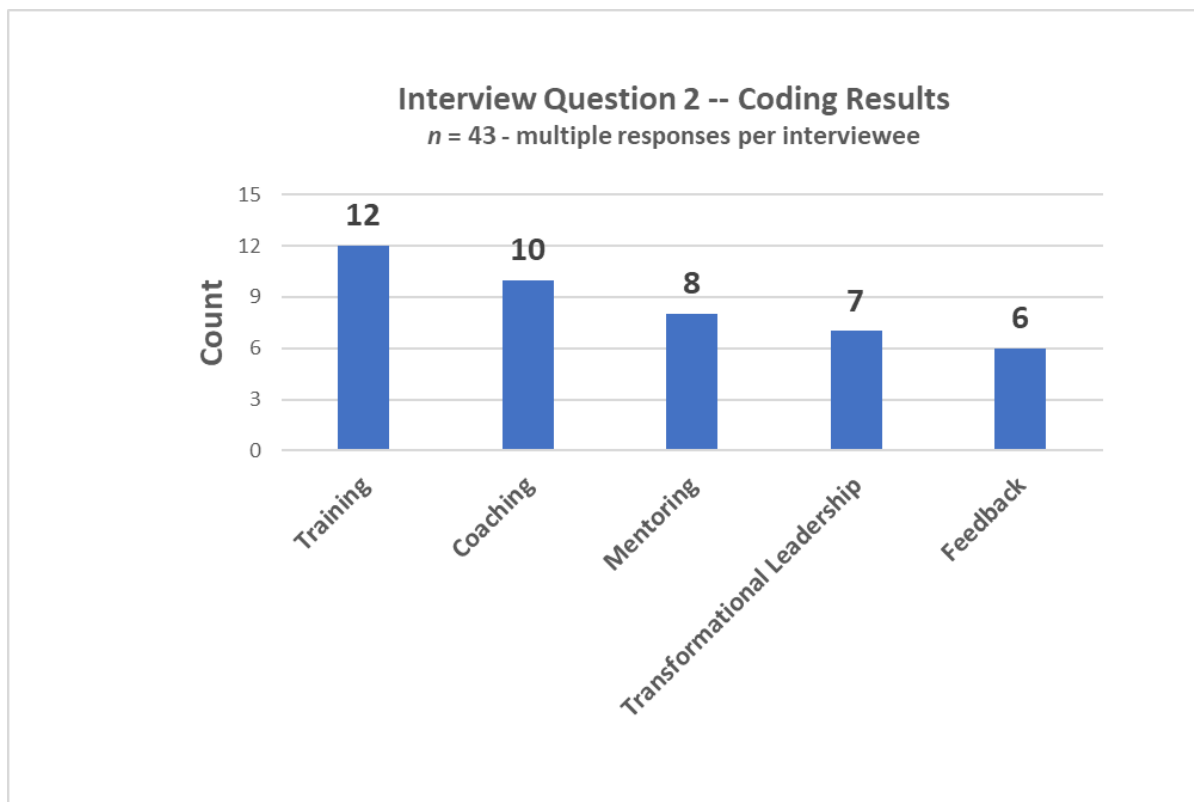
Figure 2. Implementation steps to develop employees.

Note. The figure highlights five themes derived from answers to IQ2. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

Training. The training grouping included both formal classroom settings in addition to exposure to learning opportunities through certification classes, mentorship and special project assignments. At some point in the interview, all participants talked about training centered on

technical skills and typically offered in a formal setting or project. Most mentioned certification

from one of the membership organizations noted earlier as a part of their training approach.

Many also discussed in-house technical training materials developed to capture nuances to their

organization's processes and approach. Of the 43 ideas, 12 or 27.9% of the responses to IQ2

were training related. Of note were the various forms of training employed. P9 said "…we have

benefits for higher education. We also encourage certification and temp assignments." Most

participants did not mention an overall framework for training beyond certifications or select in

house requirements.

Coaching. Coaching comprised 10 of the 43, or 23.3% of the notions shared in response

to IQ2. Since there is "no general agreement on the definition of coaching" (Rosha & Lace,

2016, p.4), for the purpose of this study coaching involves communicating with staff during a

pre-defined meeting in such a manner as to help them improve job performance. The focus on

the pre-defined meeting time distinguishes the definition of coaching employed here from

mentoring and feedback, which also have narrow definitions for this study on procurement

development best practices. Coaching does fit under the broad definition of EQ from Table 10

but appears separately here to capture better direct comments from the participants. Many

participants spoke of pre-defined times to provide feedback to staff. For example, P11 indicated

that, "I have weekly quiet hours with my new people to help them needs." P3 said, "we provide

job coaching." P2 said, "I vary my coaching based on their developmental needs." There were

other comments that included the word "coaching."

Mentoring. Mentoring comprised eight of 43, or 18.6% of the notions shared in response

to IQ2. Mentoring is a relationship between an experienced individual and a less experienced

person for developmental purposes (Opengart & Bierema, 2015). Mentoring as defined in this

study also involves a sustained and focused effort by an experienced person or entity outside of the direct chain of command to develop an individual over a period of time, versus shorter-term coaching efforts. The focus on a leader from outside the supervisory chain of command distinguishes the definition of mentoring employed here from coaching and feedback, which also have narrow definitions for this study on procurement development best practices. Mentoring does fit under the broad definition of EQ from Table 10 but appears separately here to capture better direct comments from the participants. Respondents also indicated leveraging of mentoring opportunities outside of their organizations. For example, P12 said, "I encourage …leadership developmental roles in outside membership organizations." P3 commented that, "…we leverage mentoring, special assignments and project leadership roles"

    Transformational leadership. The transformational leadership (TL) grouping included comments on individualization, personal example, inspirational motivation, coaching and efforts to inspire consistent with the definition of TL (Bass & Avolio, 1994). Birasnav (2013) noted the positive impact of a transformational leadership style on teamwork and supply chain outcomes in his work. From their research, Mena, Van Hoek & Christopher (2014) stated that procurement leaders should adopt a transformational leadership style. Interestingly, none of the leaders in this current examination of talent development best practices, *Doing It Right: Procurement Talent Development for the 21ˢᵗ Century,* said, "I'm a transformational leader." Yet the behaviors described fell neatly into categorization as transformational leadership: idealized influence - leading by example; individual consideration - customizing a leadership approach to fit the individual; and inspirational motivation - attempting provide a compelling vision aligned with company goals (Bass & Avolio, 1994). Seven or 16.3% of the 43 concepts in response to IQ2 fell in the TL category. The importance of the leader's personal example and hands-on

involvement was a reoccurring theme. P13 stated, "I'm not a theorist. I work with my people to solve problems, show them how to get things done." P11 said, "I go over the work with them to make sure they get it."

Feedback. Feedback comprised six of the 43, or 14% of the notions shared in response to IQ2. For the purpose of consistency, the definition of feedback applied to the participant's responses is timely communication with a specific, tactical goal in mind. The emphasis on timeliness and the tactical nature of the communication in the definition of feedback employed here is to distinguish feedback from coaching and mentoring, which also have narrow definitions for this study on procurement development best practices. Feedback does fit under the broad definition of EQ from Table 10 but appears separately here to capture better direct comments from the participants. Feedback descriptors alluded to by participants included timely, candid, honest, and direct. For example, P4 mentioned, "I have candid and direct conversations." P9 said "…I regularly follow up and provide feedback"

Interview question 3. "What additional elements do you use? Follow up: What impact (if any) do organizational leadership concepts, such as employee engagement, emotional intelligence or Social Emotional Learning have on your approach to developing employees?"

The examination of the participant's responses to IQ3 resulted in 45 concepts grouped into six themes. The themes that emerged are as follows: (a) emotional intelligence (EQ), (b) resources and tools, (c) set personal example (d) other leadership concepts, (e) trust and respect, and (f) consistent feedback (see Figure 3). An explanation of the concepts grouped in each theme appears in Figure 3.
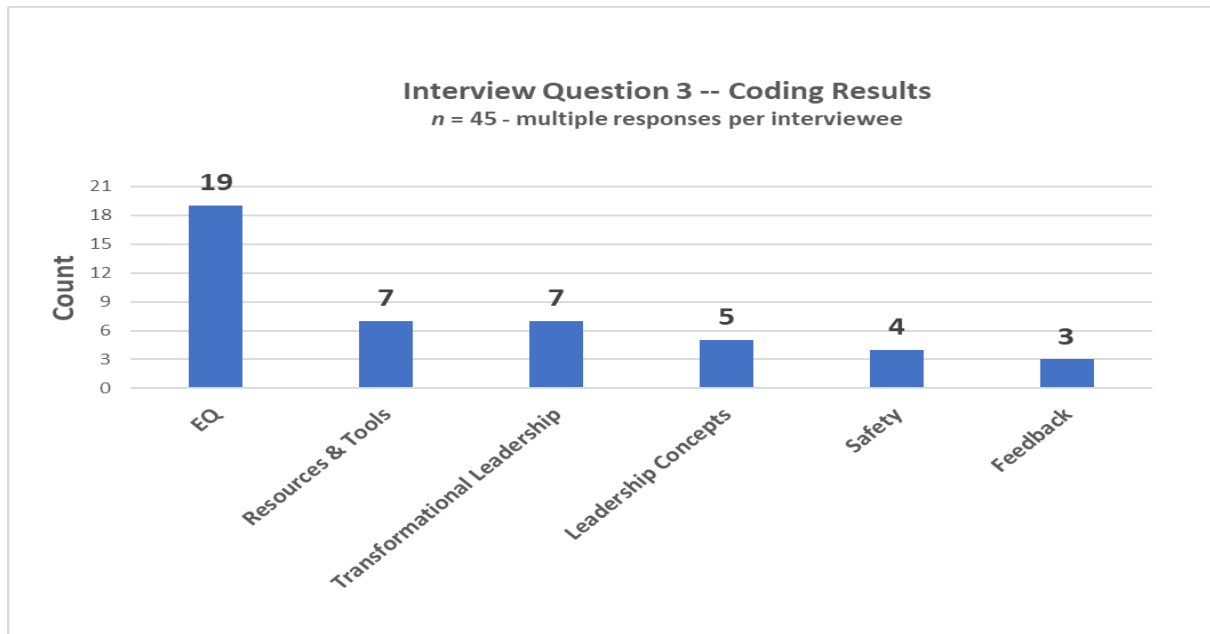
Figure 3. Additional elements to develop employees.

Note. The figure highlights six themes derived from answers to IQ3. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

EQ. Emotional intelligence or EQ comprised 19 of the 45, or 42.2% of the notions

shared in response to IQ3. From research, the definition of emotional intelligence evolved over

time as multiple investigators put forth various theories supported by research (Gayathri &

Meenakshi, 2013). In his writing *Frames of Mind*, Gardner (1983) defined [emotional]

intelligence as the ability to solve problems or to fashion products within a cultural context. The

work of Salovey & Mayer (1990) built upon earlier work on social or personal intelligences by

Gardner (1983). Goleman's framework, builds on Salovey & Mayer's (1990) concepts. For the

purpose of consistency, the definition of EQ applied to the participant's responses appears in

Table 10, and builds upon the work of Goleman, (2014,2018), with a framework provided by the

Hay Group (2011). P10 said, "The buyer has to be able to feel out resistance and how open they

[customer] are to your idea." P13 said, "It [emotional intelligence] is massively relevant."

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Resources and tools. The use resources and tools grouping included comments on

equipping others to do the job through tools, or effective corporate resource management. Seven

or 15.6% of the 45 concepts in response to IQ3 fell in the "use resources and tools category."

Time is a valuable resource that participants actively work with staff to manage in order to foster

development. Several participants noted the need to help staffers effectively manage time.

Another resource multiple respondents mentioned was the use of Individual Development Plans

(IDP) as part of the staff development process. The need to have a tool to manage and focus

staff activities was an important practice. Other respondents spoke of in-house tools used for a

similar talent development purpose. . For example, P11 indicated that, "I use IDPs as well."

P12 said, "Our other tools are limited. We are a small organization."

    Transformational leadership. The transformational leadership (TL) grouping included

comments on individualization, personal example, inspirational motivation, coaching and efforts

to inspire consistent with the definition of TL (Bass & Avolio, 1994). Birasnav (2013) noted the

positive impact of a transformational leadership style on teamwork and supply chain outcomes in

his work. From their research, Mena, Van Hoek & Christopher (2014) stated that procurement

leaders should adopt a transformational leadership style. Interestingly, none of the leaders in this

current examination of talent development best practices, *Doing It Right: Procurement Talent

Development for the 21st Century,* said, "I'm a transformational leader." Yet the behaviors

described fell neatly into categorization as transformational leadership: idealized influence -

leading by example; individual consideration - customizing a leadership approach to fit the

individual; and inspirational motivation - attempting provide a compelling vision aligned with

company goals (Bass & Avolio, 1994). Seven or 15.6% of the 45 concepts in response to IQ3

fell in the TL category. The importance of the leader's personal example.   For example, P8

commented that, I try to be the example for my staff."

Other leadership concepts. Other leadership concepts comprised five of 45, or 11.1% of

the notions shared in response to IQ3. Other leadership concepts included Crucial Conversations,

and change management. Some leaders spoke specifically to servant leadership. When pressed,

the characteristics they mentioned as servant leadership fit neatly into the definition of

transformational leadership. When questioned in detail about change management, none of the

managers indicated use of a particular model. Still, they did recognize the importance of an

overall approach to change management. P6 stated, "I augment my approach and slowly

integrate other concepts over time." P3 said, "I found Crucial Conversations to be helpful."

Safety. Safety comprised four of 45, or 8.9% of the concepts shared in response to IQ3.

Safety, although a small grouping, appears separately as a subcomponent of employee

engagement. Research on employee engagement informed the study on procurement talent

development best practices. The researcher documented safety separately as informed by

research from the literature review. Employee engagement research spoke to the importance of

safety, e.g., feeling cared about to organizational performance (Harter, et al., 2010). The Harter

et al. (2010) study noted the impact of employee work perceptions overall on organizational

performance. From Kahn's (1990) work on employee engagement, the definition of safety is

freedom to be authentic in the work without fear of negative consequences. A few managers

mentioned safety related tactics employed with staff members. A few managers mentioned

safety related tactics employed. For example, P9 mentioned, "A lot of development is based on

trust and respect." P8 said "…I treat people with respect."

Feedback. Feedback comprised three of the 45, or 6.7% of the notions shared in response to IQ3. For the purpose of consistency, the definition of feedback applied to the participant's responses is timely communication with a specific, tactical goal in mind. The emphasis on timeliness and the tactical nature of the communication in the definition of feedback employed here is to distinguish feedback from coaching and mentoring, which also have narrow definitions for this study on procurement development best practices. Feedback does fit under the broad definition of EQ from Table 10 but appears separately here to capture better direct comments from the participants. Feedback descriptors alluded to by participants included timely, candid, honest, and direct. For example, P14 commented that, I constantly follow up and provide feedback." P4 said "None really, just consistency [of] training and regular conversations."

Summary of RQ1. The goal of RQ1 was to identify strategies current purchasing managers use to develop employees. Identification of ten themes occurred through analysis of participant responses and grouping of the data. The three interview questions revealed that procurement managers use the following strategies, practices, and implementation steps to develop employees: (a) transformational leadership, (b) emotional intelligence, (c) training, (d) corporate resources and tools such as IDPs, (e) coaching, (f) feedback, (g) mentoring, (h) creating emotional safety, (i) other leadership concepts such as crucial conversations, and (j) succession planning. There was significant overlap in the responses among participants across IQ1, IQ2 and IQ3.

Research Question 2

The second research question (RQ2) queried, "What challenges do purchasing managers face in their efforts to develop employees?" Three interview questions were the basis for inquiry

with the participants to derive an answer to RQ2. The interview questions (IQ) tied RQ2 and were as follows:

IQ 4: How do you manage the biggest challenges in developing employees?

IQ 5: How do you overcome employee resistance to your efforts?

IQ 6: Did anything go wrong you had not anticipated?

Examination of the participant's responses occurred in order to look for similarities in order to derive an answer for RQ2.

Interview question 4. "How do you manage the biggest challenges in developing employees?" The examination of the participant's responses to IQ4 resulted in 54 concepts grouped into seven themes. The themes that emerged are as follows: (a) coaching, (b) training, (c) feedback, (d) employee engagement, (e) resource management, (f) transformational leadership, and (g) manage change (see Figure 4). An explanation of the concepts grouped in each theme appears below Figure 4.
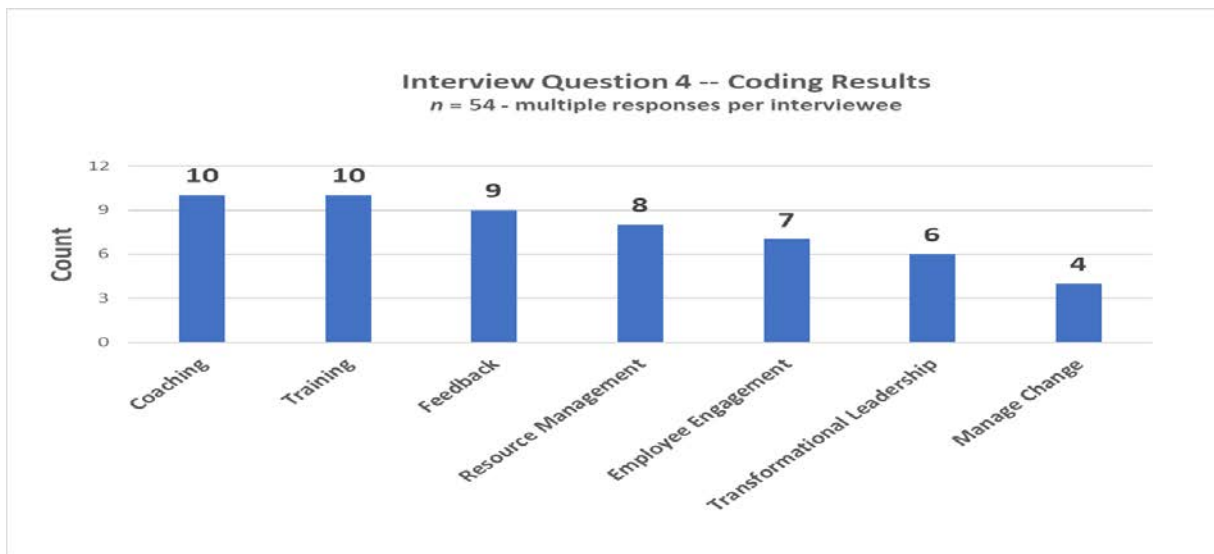

Figure 4. Managing challenges in developing employees.

Note. The figure highlights seven themes derived from answers to IQ4. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

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Coaching. Coaching comprised 10 of the 54, or 18.5% of the notions shared in response to IQ4. Since there is "no general agreement on the definition of coaching" (Rosha & Lace, 2016, p.4), for the purpose of this study coaching involves communicating with staff during a pre-defined meeting in such a manner as to help them improve job performance. The focus on the pre-defined meeting time distinguishes the definition of coaching employed here from mentoring and feedback, which also have narrow definitions for this study on procurement development best practices. Coaching does fit under the broad definition of EQ from Table 10 but appears separately here to capture better direct comments from the participants. Many participants spoke of pre-defined times to provide feedback to staff. For example, P3 said, "we provide job coaching." For example, P1 said, "I coach supervisors to develop flexibility and adaptability." And, P4 said, "I help people be clear on their own direction."

Training. The training grouping included both formal classroom settings in addition to exposure to learning opportunities through certification classes, mentorship and special project assignments. At some point in the interview, all participants talked about training centered on technical skills and typically offered in a formal setting or project. Most mentioned certification from one of the membership organizations noted earlier as a part of their training approach. Many also discussed in-house technical training materials developed to capture nuances to their organization's processes and approach. Of the 54 ideas, 10 or 18.5% of the responses to IQ4 were training related. Of note were the various forms of training employed." P14 stated "…encourage them to seek mentors, read books and listen to podcasts." One participant [to maintain confidentiality] said "train them well enough to leave, treat them well enough to stay."

Feedback. Feedback comprised nine of the 54, or 16.7% of the notions shared in response to IQ4. For the purpose of consistency, the definition of feedback applied to the

participant's responses is timely communication with a specific, tactical goal in mind. The emphasis on timeliness and the tactical nature of the communication in the definition of feedback employed here is to distinguish feedback from coaching and mentoring, which also have narrow definitions for this study on procurement development best practices. Feedback does fit under the broad definition of EQ from Table 10 but appears separately here to capture better direct comments from the participants. Feedback descriptors alluded to by participants included timely, candid, honest, and direct. P2 stated, "You start managing it [performance challenges] right away."

Resource management. Resource management comprised eight of 54, or 14.8% of the concepts shared in response to IQ4. Time is a valuable resource that participants actively work with staff to manage in order to foster development. Several participants noted the need to help staffers effectively manage time. Another resource multiple respondents mentioned was the use of Individual Development Plans (IDP) as part of the staff development process. The need to have a tool to manage and focus staff activities was an important practice. Other respondents spoke of in-house tools used for a similar talent development purpose. Managers also noted a lack of some resources necessary to develop adequately personnel. P13 said, "…there is information overload. You have to prioritize your information and time." P12 said, "Some say there is not enough time to get work done and go for training."

Employee engagement. Employee engagement, which here is a blend of meaningful work and emotional safety (Kahn, 1990), comprised seven of 54, or 13.0% of the concepts shared in response to IQ4. Safety, although a small grouping, appears separately as a subcomponent of employee engagement. Research on employee engagement informed the study on procurement talent development best practices. The researcher documented safety separately

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as informed by research from the literature review. Employee engagement research spoke to the importance of safety, e.g., feeling cared about to organizational performance (Harter, et al., 2010). The Harter et al. (2010) study noted the impact of employee work perceptions overall on organizational performance. From Kahn's (1990) work on employee engagement, the definition of safety is freedom to be authentic in the work without fear of negative consequences. A few managers mentioned safety related tactics employed with staff members. Meaningful work is the sense of value individuals find in the work itself (Kahn, 1990). For example, P7 commented that, "…engage them and provide meaningful work." P6 said, "…create safety to foster honest communication."

   Transformational leadership. The transformational leadership (TL) grouping included comments on individualization, personal example, inspirational motivation, coaching and efforts to inspire consistent with the definition of TL (Bass & Avolio, 1994). Birasnav (2013) noted the positive impact of a transformational leadership style on teamwork and supply chain outcomes in his work. From their research, Mena, Van Hoek & Christopher (2014) stated that procurement leaders should adopt a transformational leadership style. Interestingly, none of the leaders in this current examination of talent development best practices, *Doing It Right: Procurement Talent Development for the 21ˢᵗ Century,* said, "I'm a transformational leader." Yet the behaviors described fell neatly into categorization as transformational leadership: idealized influence - leading by example; individual consideration - customizing a leadership approach to fit the individual; and inspirational motivation - attempting provide a compelling vision aligned with company goals (Bass & Avolio, 1994). Six or 11.1% of the 54 concepts in response to IQ4 fell in the TL category. The importance of the leader's personal example and hands-on Managing individualization was a reoccurring theme. P10 commented, "One challenge in developing

people is that they're all in different places." P8 said, "So I try to get what skills they are really good at and get them to focus on that."

Managing change. Managing change comprised four of the 54, or 7.4% of the notions shared in response to IQ4. When questioned in detail about change management, none of the managers indicated use of a particular model. Still, they did recognize the importance of an overall approach to change management. Some indicated the pace of change had the potential for a negative impact on performance. Other managers mentioned struggles their teams had in coping with the pace and psychological impact of change. For example, P1 indicated that, "I help them deal with the psychology of change." P3 said, "I provide change management coaching."

Interview question 5. "How do you overcome employee resistance to your efforts?" The examination of the participant's responses to IQ5 resulted in 45 concepts that grouped into five themes. The themes that emerged are as follows: (a) feedback, (b) transformational leadership, (c) other leadership concepts, (d) employee engagement, and (e) manage out (see Figure 5). An explanation of the concepts grouped in each theme appears in Figure 5.

Feedback. Feedback comprised 19 of the 45, or 42.2% of the notions shared in response to IQ5. For the purpose of consistency, the definition of feedback applied to the participant's responses is timely communication with a specific, tactical goal in mind. The emphasis on timeliness and the tactical nature of the communication in the definition of feedback employed here is to distinguish feedback from coaching and mentoring, which also have narrow definitions for this study on procurement development best practices. Feedback does fit under the broad definition of EQ from Table 10 but appears separately here to capture better direct comments from the participants. Feedback descriptors alluded to by participants included timely, candid,

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honest, and direct. For example, P7 indicated, "I give people specific examples of their

developmental needs." P12 said, "You have to have factual conversations on their behavior."

Interview Question 5 -- Coding Results
n = 45 - multiple responses per interviewee
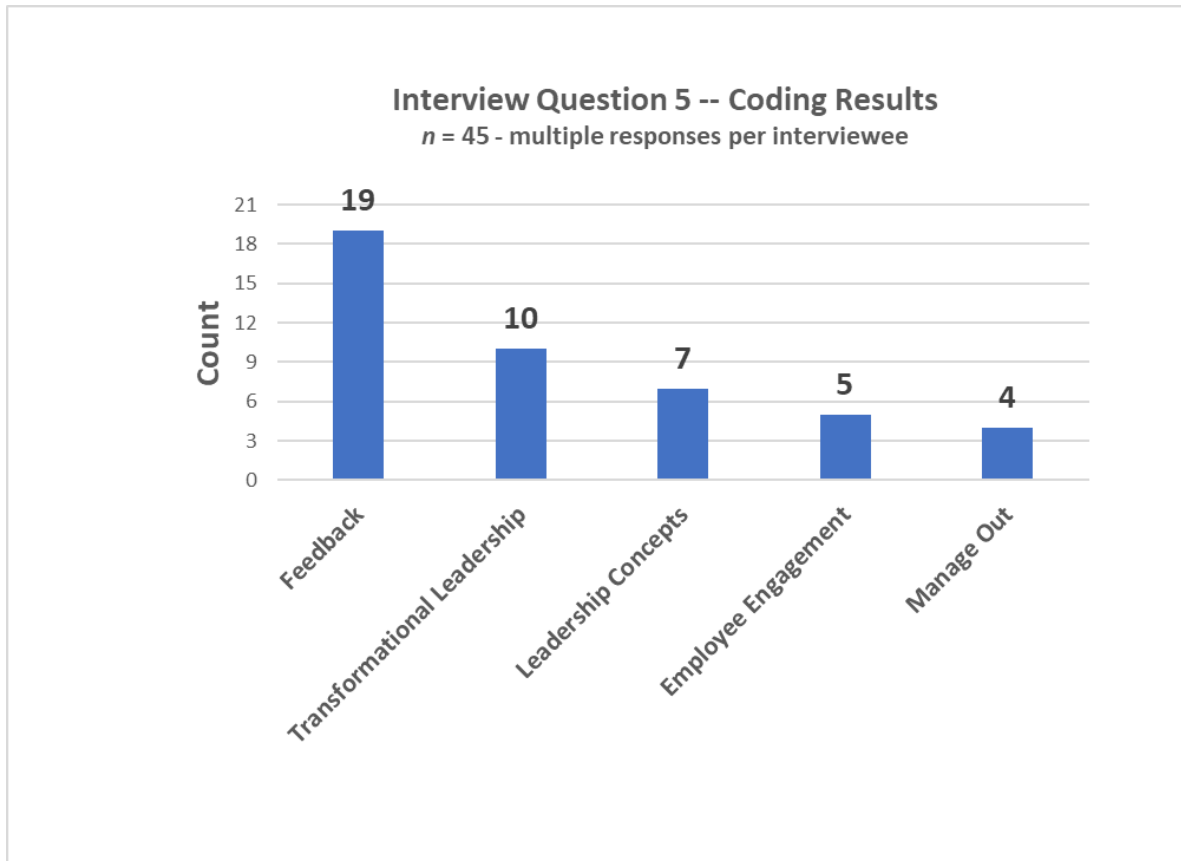
Figure 5. Additional elements to overcome employee resistance to development.

Note. The figure highlights five themes derived from answers to IQ5. The numbers are indicative
of the number of comments made by participants assigned to a particular theme.

Transformational leadership. The transformational leadership (TL) grouping included

comments on individualization, personal example, inspirational motivation, coaching and efforts

to inspire consistent with the definition of TL (Bass & Avolio, 1994). Birasnav (2013) noted the

positive impact of a transformational leadership style on teamwork and supply chain outcomes in

his work. From their research, Mena, Van Hoek & Christopher (2014) stated that procurement

leaders should adopt a transformational leadership style. Interestingly, none of the leaders in this

current examination of talent development best practices, *Doing It Right: Procurement Talent*

Development for the 21st Century, said, "I'm a transformational leader." Yet the behaviors

described fell neatly into categorization as transformational leadership: idealized influence -

leading by example; individual consideration - customizing a leadership approach to fit the

individual; and inspirational motivation - attempting provide a compelling vision aligned with

company goals (Bass & Avolio, 1994). 10 or 22.2% of the 45 concepts in response to IQ5 fell in

the TL category. The importance of the leader's personal example and hands-on managing

individualization was a reoccurring theme For example, P11 indicated that, "I set an

example…and tried to inspire him but it didn't work." P2 said "…appeal to their sense of self."

 Other leadership concepts. Other comprised seven of 45, or 15.6% of the notions shared

in response to IQ5. Other leadership concepts included Crucial Conversations, and change

management. Some leaders spoke specifically to servant leadership. When pressed, the

characteristics they mentioned as servant leadership fit neatly into the definition of

transformational leadership. When questioned in detail about change management, none of the

managers indicated use of a particular model. Still, they did recognize the importance of an

overall approach to change management. For example, P9 indicated that, "Things are changing

quickly. We have to manage that."

 Employee engagement. Employee engagement, which here is a blend of meaningful

work and emotional safety (Kahn, 1990), comprised five of 45, or 11.1% of the concepts shared

in response to IQ5. Safety, although a small grouping, appears separately as a subcomponent of

employee engagement. Research on employee engagement informed the study on procurement

talent development best practices. The researcher documented safety separately as informed by

research from the literature review. Employee engagement research spoke to the importance of

safety, e.g., feeling cared about to organizational performance (Harter, et al., 2010). The Harter

et al. (2010) study noted the impact of employee work perceptions overall on organizational performance. From Kahn's (1990) work on employee engagement, the definition of safety is freedom to be authentic in the work without fear of negative consequences. A few managers mentioned safety related tactics employed with staff members. Meaningful work is the sense of value individuals find in the work itself (Kahn, 1990). For example, P6 indicated that, "I encourage people to focus on what they enjoy in the role." P14 said, "We have an open talk to try to uncover the most trust issue."

Managing out. Managing out comprised four of the 45, or 8.9% of the notions shared in response to IQ5. Managing out is actively working to find an employee a different role within the company, or encouraging an employee to leave a company, due to performance issues. Managers were willing to employ the managing out option but did so as a last resort. Managing out is an important theme as the final option when all previous options to manage staff performance issues are unsuccessful. Generally, managers did not discuss the managing out theme unless directly questioned by the researcher. Most managers did have an experience dealing with significant underperformance by a staff member, but few detailed a manage out experience. Some did articulate a manage out situation. For example, P2 noted, "They had an outburst…they eventually left [the company]." P1 said, "You might be happier in another department."

Interview question 6. "Did anything go wrong you had not anticipated?" The examination of the participant's responses to IQ6 resulted in 30 concepts that grouped into three themes. The themes that emerged are as follows: (a) yes, discipline issues, (b) yes, improve coaching, (c) no (see Figure 6.0). An explanation of the concepts grouped in each theme appears in Figure 6.

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Interview Question 6 -- Coding Results
n = 30 - multiple responses per interviewee
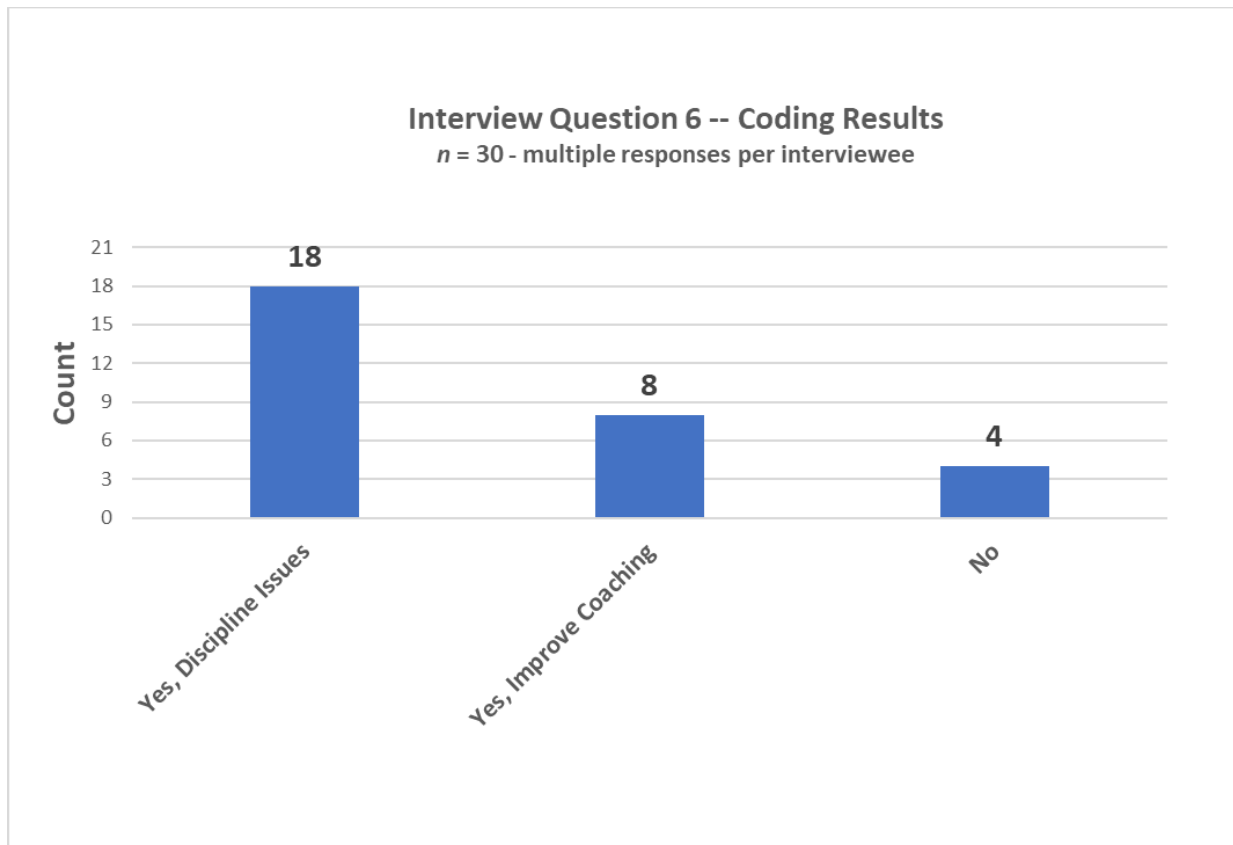
Figure 6. Unanticipated problems with developing employees.

Note. The figure highlights three themes derived from answers to IQ6. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

*Yes, discipline issues***.** When pressed, procurement managers spoke of their employee development efforts falling short. Eighteen of 30, or 60.0% of responses to IQ 6 related to managing discipline issues. The researcher noted from the recordings and transcripts that the participants used discipline only when necessary. Discipline ranged from a simple, direct conversation to the managing out option. Managers were willing to employ the managing out option but did so as a last resort. Generally, managers did not discuss the managing out theme unless directly questioned by the researcher. Most managers did have an experience dealing with significant underperformance by a staff member, requiring some measure of discipline. For

example, P7 indicated that, "We had constructive talks. I put him on an action plan." P3 said "I suggested he might be happier somewhere else."

Yes, coach employee. Several managers felt more coaching was necessary when development plans did not go as anticipated. Since there is "no general agreement on the definition of coaching" (Rosha & Lace, 2016, p.4), for the purpose of this study coaching involves communicating with staff during a pre-defined meeting in such a manner as to help them improve job performance. The focus on the pre-defined meeting time distinguishes the definition of coaching employed here from mentoring and feedback, which also have narrow definitions for this study on procurement development best practices. Eight of 30, or 26.7% of responses to IQ6 mentioned more coaching for underperforming employees. In this example, coaching tended to be more formal than a feedback conversation. For example, P5 commented that, "…some misjudge a person. I apologized and took responsibility." P14 said, "I encourage them to develop other relationships to help them."

No. There were a subset of managers, four of 30 or 13.3%, who had not yet experienced an ineffectual developmental approach. P8 stated "Nothing I can think of." P6 said "Not yet. My team is motivated." All managers who had not yet experienced an employee discipline issue were in the supervisor role, as distinguished from the manager or executive role. All managers with more than 10 years experienced noted at least one instance where their initial developmental approach did not yield the desired outcome.

Summary of RQ2. The goal of RQ2 was to identify the challenges purchasing managers face in their efforts to develop employees. Identification of ten themes occurred through analysis of participant responses and grouping of the data. The three interview questions revealed that procurement managers face multiple challenges in their efforts to develop employees. The top

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four challenges include: (a) providing helpful feedback, (b) managing discipline issues, (c) transformational leadership, (inspire and be the example), and (d) provide better coaching on mindset, expectations and performance. Additional challenges are (e) employee engagement (meaningful work in a safe environment), (f) training, (g) leveraging the right leadership concept at the right time, (h) resource management (time) (h) managing change, and (i) managing out underperformers.

Research Question 3

The third research question (RQ3) queried, "How do purchasing managers measure and track success in developing employees?" Four interview questions were the basis for inquiry with the participants to derive an answer to RQ3. Each Interview Question (IQ) tied RQ3 and were as follows:

IQ 7: What are the top metrics you track to measure success in developing employees? (limit them to 3-5 if they went long)

IQ 8: What outcome(s) are you willing to accept?

IQ 9: What assistance does your organization give you in measuring and tracking employee development?

IQ 10: What factors would you like to measure and track but are unable to do so?

Examination of the participant's responses occurred in order to look for similarities in order to derive an answer for RQ3.

Interview question 7. "What are the top metrics you track to measure success in developing employees? (limit them to 3-5 if they went long)." The examination of the participant's responses to IQ7 resulted in 47 concepts that grouped into six themes. The themes that emerged are as follows: (a) emotional intelligence (EQ), (b) promotions, (c) customer

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comments, (d) progress towards goals, (e) qualitative measures, and (f) meaningful work (see

Figure 7). An explanation of the concepts grouped in each theme appears in Figure 7.

Interview Question 7 -- Coding Results
n = 47 - multiple responses per interviewee
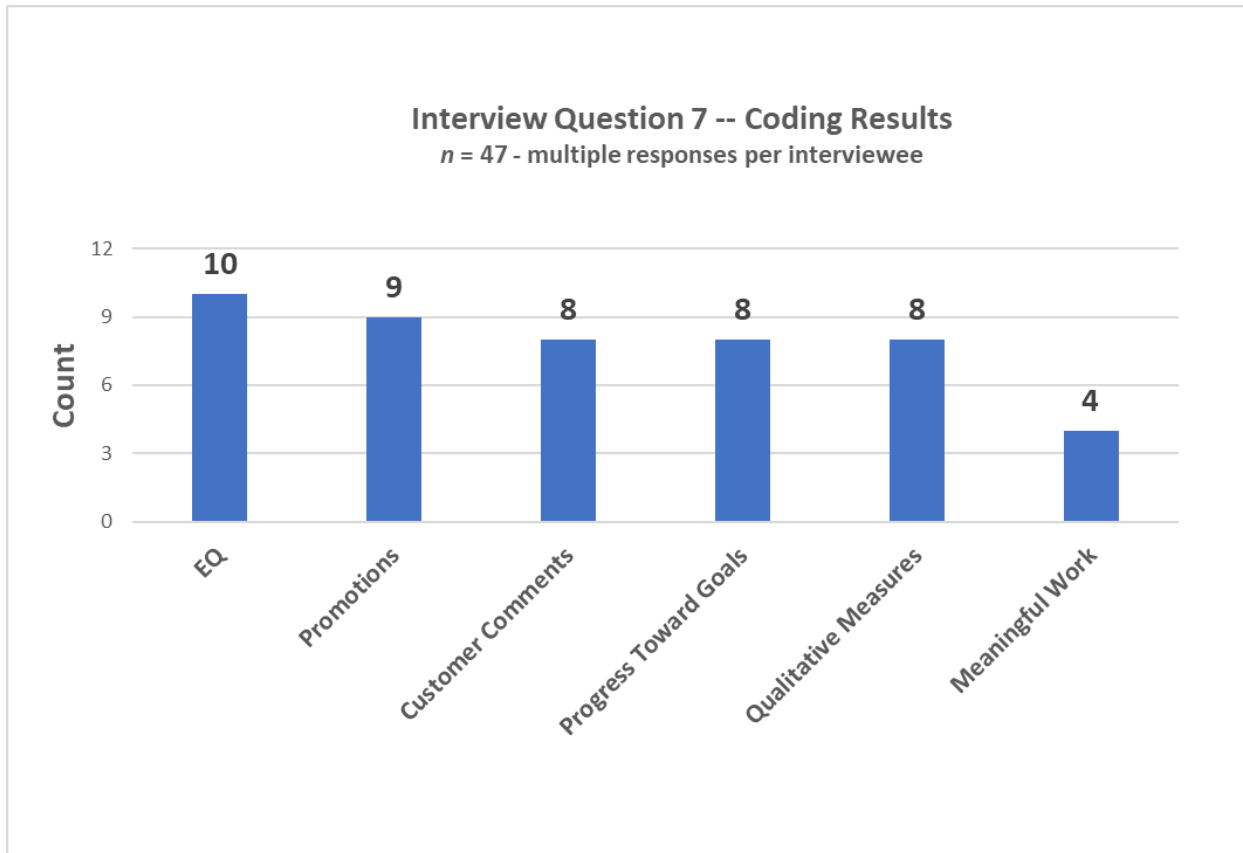
Figure 7. Top metrics to track employee developmental success.

Note. The figure highlights six themes derived from answers to IQ7. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

EQ. Emotional intelligence or EQ comprised ten of the 47, or 21.3% of the notions

shared in response to IQ7. From research, the definition of emotional intelligence evolved over

time as multiple investigators put forth various theories supported by research (Gayathri &

Meenakshi, 2013). In his writing *Frames of Mind*, Gardner (1983) defined [emotional]

intelligence as the ability to solve problems or to fashion products within a cultural context. The

work of Salovey & Mayer (1990) built upon earlier work on social or personal intelligences by

Gardner (1983). Goleman's framework, builds on Salovey & Mayer's (1990) concepts. For the

purpose of consistency, the definition of EQ applied to the participant's responses appears in Table 10, and builds upon the work of Goleman, (2014,2018), with a framework provided by the Hay Group (2011). Manager comments were as follows: P6 said, "Are they growing in emotional intelligence?" P10 indicated, "…when they learn to read situations."

Promotions. Of the 47 ideas, nine or 19.1% of the responses to IQ7 were promotion related. Managers consider promotions a good measure of their effectiveness in developing employees. Some mangers viewed promotional opportunities as a more objective measure of performance. Others mentioned promotions were not the only measure, particularly in organizations where few promotional opportunities existed. Some managers alluded to the development of a broader skill set after a promotion than the staff member displayed to gain the new role. Overall, promotions were progress and evidence of staff development. For example, P1 stated, "One good way is when you see them get promoted." P4 said "…progress against goals, and promotions also."

Customer comments. Customer comments comprised eight of 47, or 17.0% of the notions shared in response to IQ7 or measuring success in employee development. All managers viewed procurement as a customer service organization, and customer feedback an important measure of success. The customer service component of procurement organizations are similar to customer service factors in other organizations noted in research (Harter et al., 2010). Based on research from the literature review, it is possible that the findings of this study will apply to other customer service organizations as well. Multiple managers noted the importance of customer feedback to measure staff development. For example, P11 said" I look at customer feedback." P7 mentioned "customer feedback, innovations and promotions"

Progress toward goals. Employee progress toward stated goals comprised eight of the 47, or 17.0% of the notions shared in response to IQ7, as a measure of developmental success. Participants employed various means to track progress. The lack of useful tools from the organization was apparent in the comments. There was also a lack of formality in tracking progress for some managers. Still, managers recognized the importance of tracking performance and developed their own unique approaches to do so. For example, P3 indicated that, "I don't have formal metrics. Informally is the way I track it. I look at progress toward objectives from last year." P4 said, "I use the poor man's dashboard – Excel – to track everyone's progress."

Qualitative measures. Qualitative measures comprised eight of 47, or 17.0% of the notions shared in response to IQ7. Respondents noted a lack of uniform quantitative measures of success in development. There exist similarities with the approach used to track progress against objectives. The lack of useful tools from the organization was apparent in the comments. There was also a lack of formality in tracking progress for some managers. Still, managers recognized the importance of tracking performance and developed their own unique approaches to do so. For example, P11 indicated that, "My measures are more subjective..." P12 …when I hear them talk as an expert on a subject."

Meaningful work. Employee engagement, which here is a blend of meaningful work and emotional safety (Kahn, 1990), comprised four of 47, or 8.5% of the concepts shared in response to IQ7. Meaningful work is the sense of value individuals find in the work itself (Kahn, 1990). Meaningful work, although a small grouping, appears separately as a subcomponent of employee engagement. Research on employee engagement informed the study on procurement talent development best practices. The researcher documented meaningful work separately as informed by research from the literature review. Employee engagement research spoke to the

importance of meaningful, e.g., making a difference in organizational performance (Harter, et al., 2010). The Harter et al. (2010) study noted the impact of employee work perceptions overall on organizational performance. From Kahn's (1990) work on employee engagement, the definition of safety is freedom to be authentic in the work without fear of negative consequences. A few managers mentioned safety related tactics employed with staff members. For example, P12 noted, "…when I hear them talk as an expert on a subject and find it meaningful." P10 said, "Are they happy in the job? Are they meeting their goals?"

Interview question 8. "What outcome(s) are you willing to accept?" The examination of the participant's responses to IQ8 resulted in 16 concepts that grouped into two themes. The themes that emerged are as follows: (a) performance vs. standard and, (b) basic customer service (see Figure 8). An explanation of the concepts grouped in each theme appears below Figure 8.
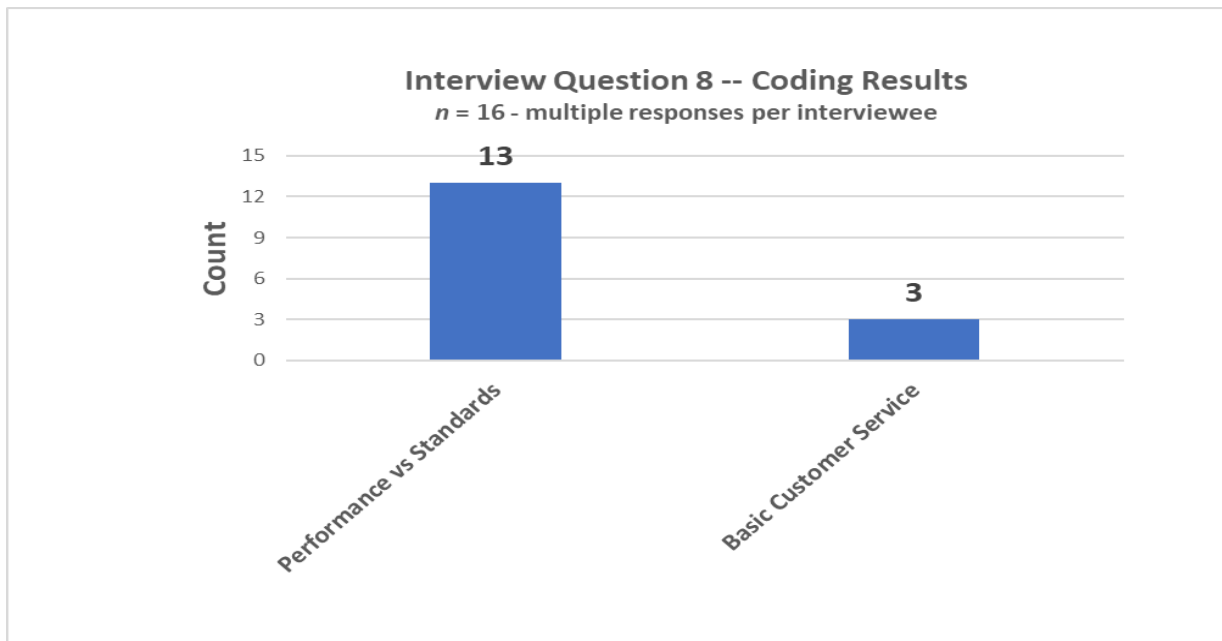

Figure 8. Staff performance outcomes acceptable to procurement managers.

Note. The figure highlights two themes derived from answers to IQ8. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

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Performance vs. standards. Staff performance vs. standards comprised 13 of the 16, or 81.3% of the notions shared in response to IQ8. Most managers articulated a baseline expectation of employee job performance. There exist similarities with the approach used to track progress against objectives, and a lack of quantitative metrics. The lack of useful tools from the organization was apparent in the comments. There was also a lack of formality in tracking progress for some managers. Still, managers recognized the importance of tracking performance and developed their own unique approaches to do so. Respondents noted a lack of uniform quantitative measures of success in development. For example, P9 indicated, "There is baseline performance. You have to be able to do the job. P3 said, "Do the job well and perform"

Basic customer service. Customer service was also a minimum expectation concerning role performance. Of the 16 ideas, three or 18.8% of the responses to IQ8 were as customer service related. Arguably, customer service is performance vs. standards but listed separately to highlight participant responses. All managers viewed procurement as a customer service organization, and customer feedback an important measure of success. The customer service component of procurement organizations are similar to customer service factors in other organizations noted in research (Harter et al., 2010). Based on research from the literature review, it is possible that the findings of this study will apply to other customer service organizations as well. Multiple managers noted the importance of customer feedback to measure staff development. P1 said, "I expect minimal complaints and performance against my objectives. P3 said "…good customer service…"

Interview question 9. "What assistance does your organization give you in measuring and tracking employee development?" The examination of the participant's responses to IQ9

resulted in 25 concepts grouped into four themes. The themes that emerged are as follows: (a)

little or no help, (b) IDPs and other tools, (c) human resource coaching and, (d) training (see

Figure 9). An explanation of the concepts grouped in each theme appears in Figure 9.
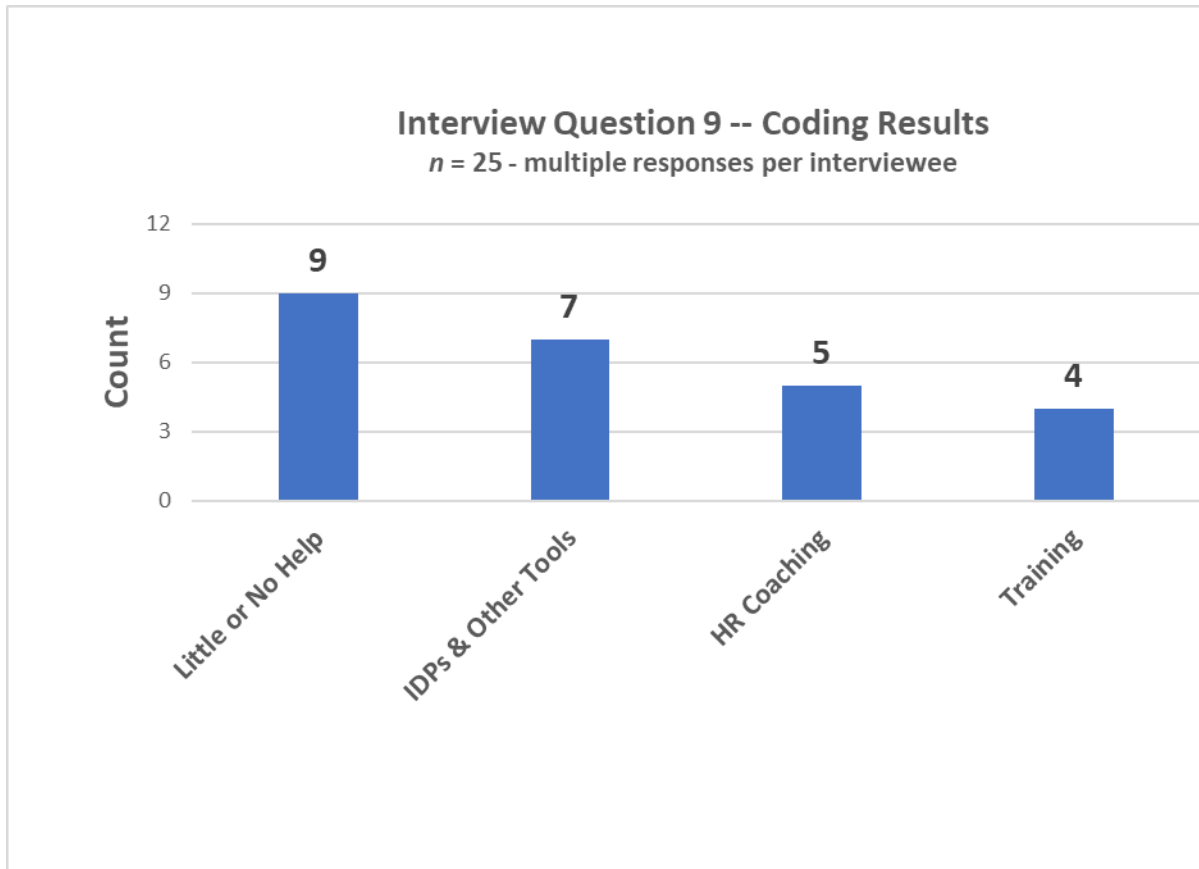
Figure 9. Company provided assistance in developing employees.

Note. The figure highlights six themes derived from answers to IQ9. The numbers are indicative
of the number of comments made by participants assigned to a particular theme.

	***Little or no help*.** Receipt of little or no help from the organization comprised nine of 25,

or 36.0% of the concepts shared in response to IQ9. Respondents noted they felt a paucity of

assistance from their organization in measuring and tracking employee development. Interesting

to note some mentioned training courses provided by HR, in-house tools, Learning Management

Systems (LMS), IDPs and other tools, but overall indicated minimal support in staff

development metrics. The lack of tools or the perception of a lack of tools from HR may

represent an opportunity to increase the value proposition of HR to line mangers. P1 said "…not a lot of help." P5 retorted "None that I'm aware of."

Individual development plans and similar tools. The use resources and tools grouping included comments on equipping others to do the job through tools, or effective corporate resource management. Managers did note a lack of adequate tools to develop adequately personnel. Seven or 28.0% of the 25 concepts in response to IQ9 fell in the use resources and tools category. One resource multiple respondents mentioned was the use of Individual Development Plans (IDP) as part of the staff development process. The need to have a tool to manage and focus staff activities was an important practice. Other respondents spoke of in-house tools used for a similar talent development purpose. In a direct response to the interview question P13 said, "We use exactly IDPs." P11 said, "We have the annual salary review and the performance matrix from HR."

Coaching from human resources department. Coaching comprised five of the 25, or 20.0% of the notions shared in response to IQ9. Since there is "no general agreement on the definition of coaching" (Rosha & Lace, 2016, p.4), for the purpose of this study coaching involves communicating with staff during a pre-defined meeting in such a manner as to help them improve job performance. Coaching does fit under the broad definition of EQ from Table 10 but appears separately here to capture better direct comments from the participants. Many participants spoke of meeting with HR to seek assistance with staff development. P9 indicated, "HR offers coaching and staff support on cultural change issues". P12 said, "HR has an open-door policy." The open door policy approach mentioned by P12, better fits our definition of mentoring, but appears here for efficiency of coding the responses.

Training. The training grouping included both formal classroom settings in addition to exposure to learning opportunities through certification classes, mentorship and special project assignments. At some point in the interview, all participants talked about training centered on technical skills and typically offered in a formal setting or project, some offered by the organization. Most mentioned certification from one of the membership organizations noted earlier as a part of their training approach. Many also discussed in-house technical training materials developed to capture nuances to their organization's processes and approach. Of the 25 ideas, four or 16.0% of the responses to IQ9 were training related. Of note were the various forms of training employed. P2 responded "…tuition reimbursement, flexible time off for school and webinars." P4 indicated, "[company] offers lots of courses."

Interview question 10. "What factors would you like to measure and track but are unable to do so?" The examination of the participant's responses to IQ10 resulted in 17 concepts grouped into four themes. The themes that emerged are as follows: (a) none, (b) performance metrics, (c) reporting and tools, and (d) work-life balance (see Figure 10). An explanation of the concepts grouped in each theme appears in Figure 10.

None come to mind. Most procurement managers did not have additional performance metrics they would like to measure. Eight of 17, or 47.1% of the responses to IQ 10 were in this category. Some procurement managers developed their own metrics and tools given the lack of any provided by their organization. Others were able to use tools from the organization. Still, most managers did not mention additional developmental metrics they would like to track. For example, in response to IQ10, P2 said, "None come to mind." P7 mentioned, "I have the information I need."

Interview Question 10 -- Coding Results
n =17 - multiple responses per interviewee
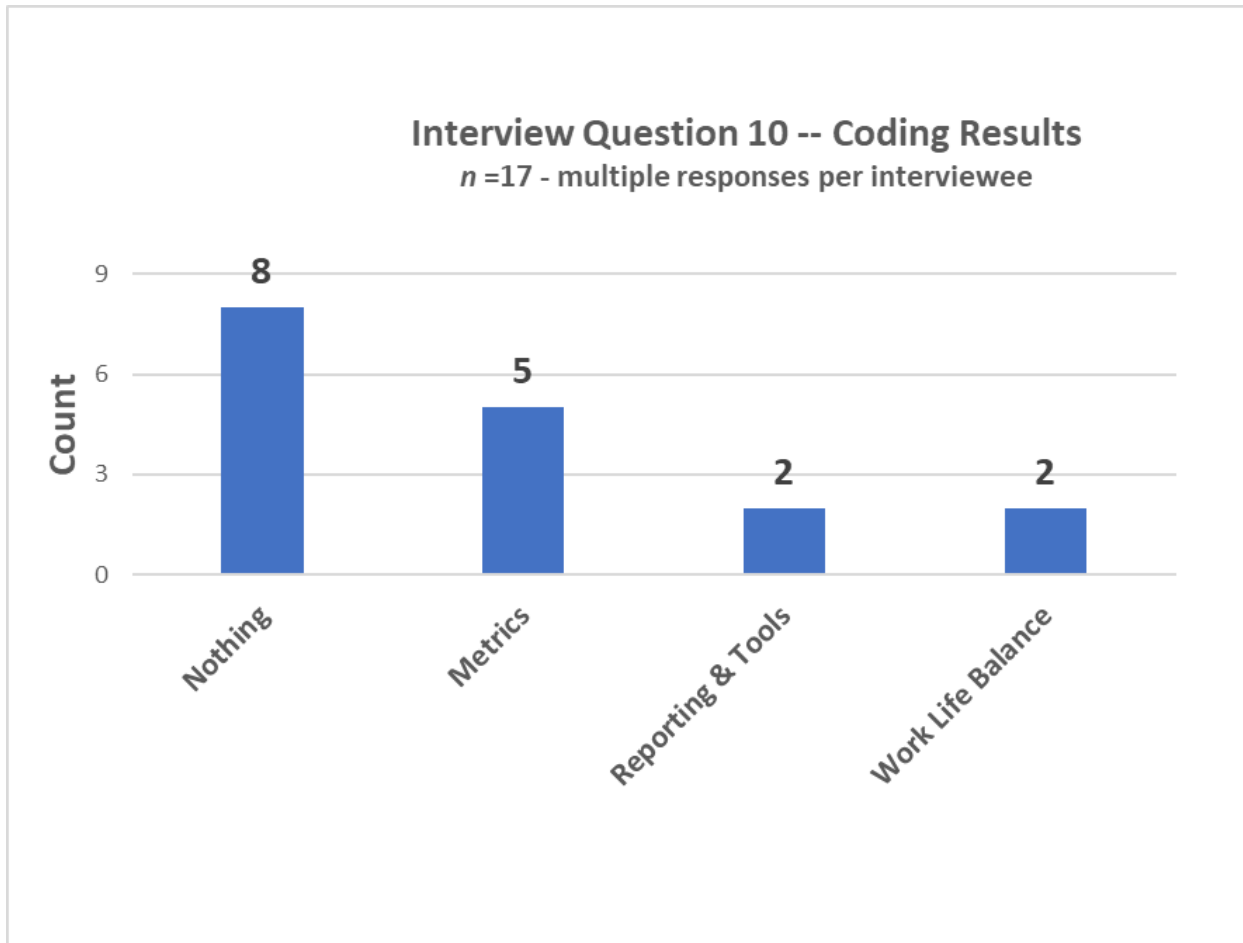
Figure 10. Additional developmental metrics managers would like to track.

Note. The figure highlights four themes derived from answers to IQ10. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

    Job performance metrics. Several procurement managers would like consistent

company provided job performance metrics to help them measure and track employee

development. There exist similarities with the approach used to track progress against

objectives, and a lack of quantitative metrics. There was also a lack of formality in tracking

progress for some managers. Still, managers recognized the importance of tracking performance

and developed their own unique approaches to do so. Respondents noted a lack of uniform

quantitative measures of success in development. Five of 17, or 29.4% of the responses to IQ 10

were in this category. Some procurement managers developed their own metrics and tools given

the lack of any provided by their organization P1 said, "There isn't a consistent measure on employee work product." P6 said, "We don't quantify employee performance as an organization so I have my own approach."

Reporting and tools. The use resources and tools grouping included comments on equipping others to do the job through tools, or effective corporate resource management. Managers did note a lack of adequate tools to develop adequately personnel. One resource multiple respondents mentioned was the use of Individual Development Plans (IDP) as part of the staff development process. The need to have a tool to manage and focus staff activities was an important practice. Other respondents spoke of in-house tools used for a similar talent development purpose. Two or 11.8% of the 17 concepts in response to IQ10 fell in the use resources and tools category. P8 said, "We need better reporting tools."

Work-life balance. Two procurement managers mentioned they would like insight into how to measure work-life balance. Two of 17, or 11.8% of the responses to IQ 10 were in this category. P10 said, "I'm not sure how to measure work-life balance. They may be doing a great job. But, are they happy? Meaningful work is the sense of value individuals find in the work itself (Kahn, 1990). Work-life balance, although a small grouping appears separately as a subcomponent of employee engagement (meaningful work). Research on employee engagement informed the study on procurement talent development best practices.

Summary of RQ3. The goal of RQ3 was to identify how purchasing managers measure and track success in developing employees. Identification of thirteen themes resulted from analysis of participant responses and grouping of the data. The four interview questions revealed that the top four ways procurement managers measure and track success in developing employees are (a) performance against company standards, (b) customer service and comments,

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(c) promotions, and (d) EQ growth of staff. Additional measures include (e) progress toward developmental goals (f) self-generated performance metrics/qualitative measures, (g) IDPs, reports, and other tools, (h) training attended, (i) employee engagement (meaningful work), and (j) work-life balance.

Research Question 4

The fourth research question (RQ4) queried, "What recommendations would current purchasing managers give the future generation of leaders in developing employees?" Two interview questions were the basis for inquiry with the participants to derive an answer to RQ4. The interview questions (IQ) tied to RQ4 and were as follows:

> IQ 11: What lessons have you learned in employee development we have not covered in
>
> this interview?
>
> IQ 12: What would you not do over?

Examination of the participant's responses occurred in order to look for similarities in order to derive an answer for RQ4.

Interview question 11. "What lessons have you learned in employee development we have not covered in this interview?" The examination of the participant's responses to IQ11 resulted in 44 concepts that grouped into six themes. The themes that emerged are as follows: (a) servant leadership, (b) example and empathy, (c) employee engagement, (d) feedback, (e) other leadership concepts, and (f) training (see Figure 11). An explanation of the concepts grouped in each theme appears in Figure 11.
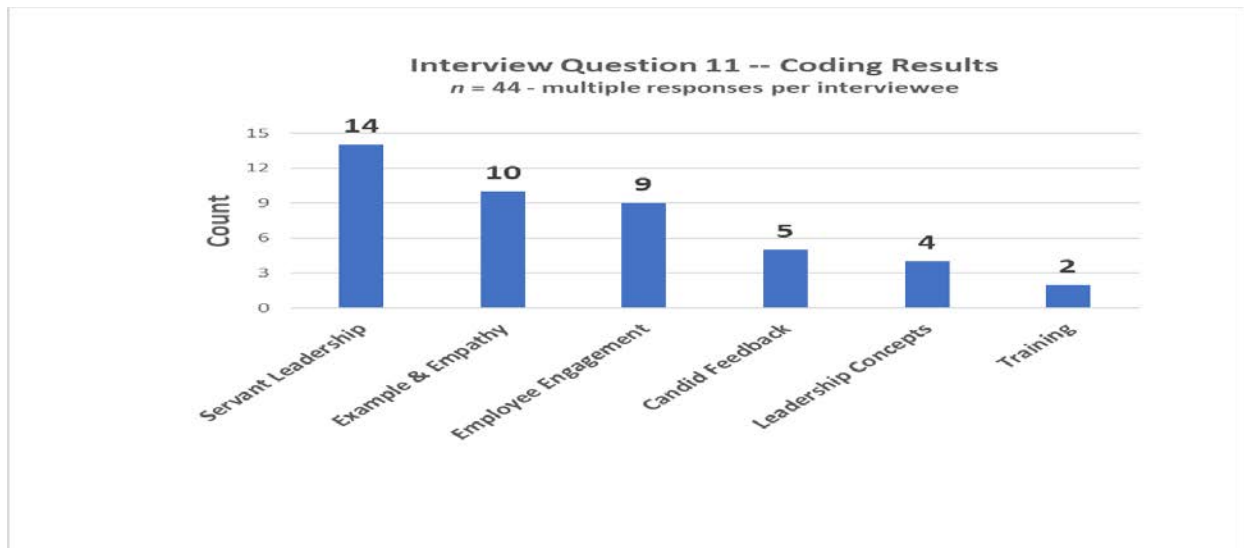
Figure 11. Additional staff lessons not previously mentioned.

Note. The figure highlights six themes derived from answers to IQ11. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

Servant leadership. Servant leadership comprised 14 of 44, or 31.8% of the concepts

shared in response to IQ11. As described by participants there was similarity to transformational

leadership, but since the participants used the word 'serve" or the phrase "servant leadership" it

appears here. A few managers mentioned safety related tactics employed. For example, P5

stated, "make time for your people, and serve them." P5 also stated, "We overcomplicated

leadership. It's simple. Apply the golden rule. Lead the way you want to be led." P9 said, "Get

to know your people. Respect their humanity. Lead them through influence." P10 mentioned

"servant leadership."

Personal example and empathy. Personal example and empathy comprised 10 of the 44,

or 22.7% of the notions shared in response to IQ11. Both of the concepts fit into either

emotional intelligence or transformational leadership classifications in response to earlier

interview questions. Personal example and empathy appear as a theme here to capture better

direct quotes from the participants and to lend the reader insight into nuances. P10 said, "Don't micromanage. Show empathy." P13 said, "Get to know your people, model the behavior."

Employee engagement. Employee engagement, which here is a blend of meaningful work and emotional safety (Kahn, 1990), comprised nine of 44, or 20.5% of the concepts shared in response to IQ11. Safety, although a small grouping, appears separately as a subcomponent of employee engagement. Research on employee engagement informed the study on procurement talent development best practices. The researcher documented safety separately as informed by research from the literature review. Employee engagement research spoke to the importance of safety, e.g., feeling cared about to organizational performance (Harter, et al., 2010). The Harter et al. (2010) study noted the impact of employee work perceptions overall on organizational performance. From Kahn's (1990) work on employee engagement, the definition of safety is freedom to be authentic in the work without fear of negative consequences. A few managers mentioned safety related tactics employed with staff members. Meaningful work is the sense of value individuals find in the work itself (Kahn, 1990). For example, P11 indicated, "Create emotional safety for your team." P7 retorted, "Provide meaningful work and stretch assignments."

Feedback. Feedback comprised five of the 44, or 10% of the notions shared in response to IQ11. For the purpose of consistency, the definition of feedback applied to the participant's responses is timely communication with a specific, tactical goal in mind. The emphasis on timeliness and the tactical nature of the communication in the definition of feedback employed here is to distinguish feedback from coaching and mentoring, which also have narrow definitions for this study on procurement development best practices. Feedback does fit under the broad definition of EQ from Table 10 but appears separately here to capture better direct comments

from the participants. Feedback descriptors alluded to by participants included timely, candid,

honest, and direct. For example, P1 indicated that, "You must have constructive challenging

talks." P4 said, "You have to establish trust and communication." P9 said "Coach and mentor

your team."

Other leadership concepts. Other leadership concepts comprised four of 44, or 9.1% of

the notions shared in response to IQ11. Other leadership concepts included Crucial

Conversations, emotional intelligence, and change management. When questioned in detail

about change management, none of the managers indicated use of a particular model. Still, they

did recognize the importance of an overall approach to change management. Generally,

comments covered concepts covered previously. For example, P6 indicated that, "The biggest

issue is the question of emotional intelligence."

Training. Of the 44 ideas, two or 4.5% of the responses to IQ11 were training related.

The training grouping primarily included formal classroom settings in IQ11 responses. The

training grouping included both formal classroom settings in addition to exposure to learning

opportunities through certification classes, mentorship and special project assignments. At some

point in the interview, all participants talked about training centered on technical skills and

typically offered in a formal setting or project, some offered by the organization. Most

mentioned certification from one of the membership organizations noted earlier as a part of their

training approach. For example, P12 noted, "develop technical skills." P8 said, "Managers need

to attend refresher classes."

Interview question 12. "What would you not do over?" The examination of the

participant's responses to IQ12 resulted in 26 concepts grouped into two themes. The themes

that emerged are as follows: (a) delay candid feedback and (b) nothing I can think of (see Figure

12). An explanation of the concepts grouped in each theme appears below Figure 12.
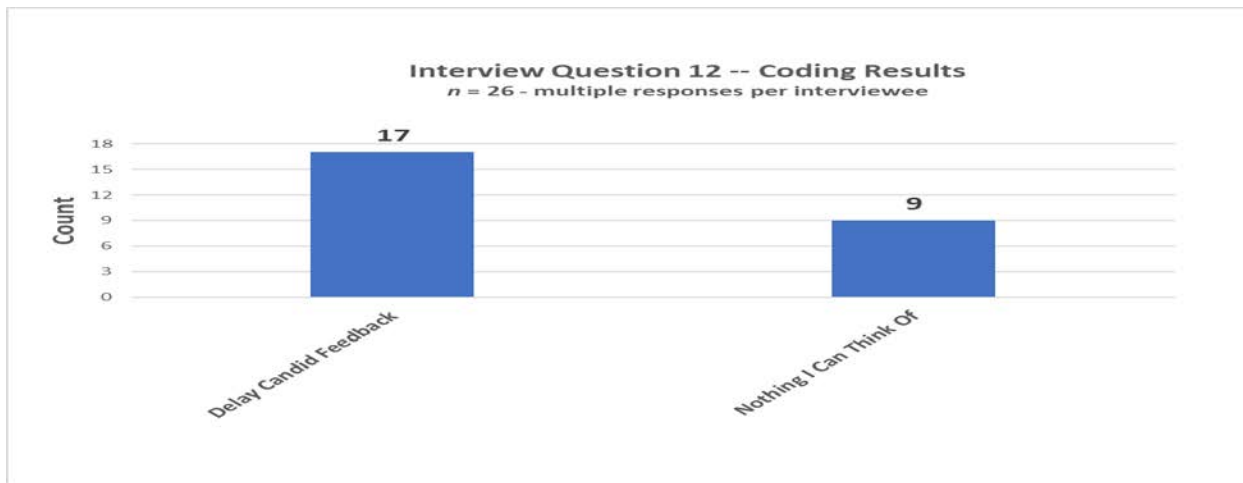
Figure 12. Developmental activities managers would not 'do over.'

Note. The figure highlights two themes derived from answers to IQ12. The numbers are indicative of the number of comments made by participants assigned to a particular theme.

Delay candid feedback. Most respondents said they would not delay candid feedback

when necessary. Most procurement managers did not have additional comments. Timeliness of

feedback was paramount to addressing performance issues. Some respondents also spoke to the

structure of those feedback conversations. Delay candid feedback comprised 17 of 26, or 65.4%

of the notions shared in response to IQ12. P7 said, "I'd have timely conversations about

performance." P14 mentioned, "I would be more structured in development discussions earlier."

Nothing I can think of. Many procurement managers did not have anything specific that

they would not "do over." Nine of 26, or 34.6% of the responses to IQ 12 were in this category.

P4 said, "I haven't had any of those." P7 said "Not really. Just have conversations." Generally,

managers had few regrets concerning their staff development approach. Most felt successful in

working with their staff based on their overall comments.

Summary of RQ4. The goal of RQ4 was to capture recommendations current purchasing managers would give future generations of leaders in development employees. From analysis of the participant's, the identification of six themes emerged. The four interview questions revealed that current procurement managers would make the following type of recommendations to future procurement managers: (a) give timely and candid feedback, (b) be servant leaders, (c) engage employees, (d) set an example and show empathy, (e) leverage leadership concepts, and (f) attend training.

Summary

The purpose of this study was to identify the best practices that today's procurement leaders use to develop employees. Fifteen current procurement leaders participated in interviews to help accomplish the study's purpose. The participants responded to 12 semi-structured interview questions designed to inform the following four research questions:

1. What strategies and practices do current purchasing managers use to develop employees?

2. What challenges do purchasing managers face in their efforts to develop employees?

3. How do purchasing managers measure and track success in developing employees?

4. What recommendations would current purchasing managers give the future generation of leaders in developing employees?

The researcher coded the data and validated the results with the assistance of two inter-rater Pepperdine doctoral candidates. Data analysis employed the phenomenological approach explained in chapter three. Data analysis yielded 45 themes. Table 11, provides a summary of all the themes obtained through the data analysis process. Chapter 5 presents a discussion of themes, implications, recommendations, and conclusions of the study.

Table 11

Summary of Themes for Four Research Questions

RQ1.	RQ2.	RQ3.	RQ4.
transformational leadership	providing effective feedback	performance against company standards	give timely and candid feedback
emotional intelligence	managing discipline issues	customer service and comments	be servant leaders
training	transformational leadership	promotions	engage employees
resources and tools such as IDPs	provide better coaching	EQ growth of staff	set an example and show empathy
coaching	employee engagement	progress toward developmental goals/qualitative measures	leverage leadership concepts
feedback	training	self-generated performance metrics	attend training
mentoring	leveraging the right leadership concept	IDPs, reports, and other tools	
emotional safety	resource management (time)	training attended	
other leadership concepts such as Crucial Conversations	managing change	employee engagement	
succession planning	managing out underperformers	work life balance	

Note: This table is a summary of all the themes derived through the data analysis process.

Chapter 5: Conclusions and Recommendations

Introduction to the Study

Global Gross Domestic Product (GDP) exceeded $75 trillion in 2016 according to the World Bank (2016). Some estimate approximately half of that figure derives from company supply chains (Simpson, 2017). However, over half of the leaders surveyed in the Deloitte/Bersin Global Chief Procurement Officer Survey do not believe their teams have the skills necessary to execute their company's procurement strategy (Umbenhauer et al., 2018). Christopher (2016) cites the difficulty firms have in developing teams with the requisite breadth of skill and flexibility to meet today's supply chain challenges. Other industry experts also cite skill gaps in procurement personnel (Harrington, 2015; Ruamsook & Craighead, 2014). In summary, skills gaps in procurement teams have the potential to affect adversely business performance for companies worldwide. Therefore, effective training of a company's procurement staff is a business imperative for many firms.

This study entitled *Doing It Right: Developing Procurement Talent for the 21st Century* captures the best practices of today's procurement leaders in their effort to address the talent development needs of their organizations. The findings in this document add to the existing body of literature on procurement talent development by documenting these best practices at a time of significant generational shift in the workplace (Tuglan, 2016). This study examines strategies and practices used by the current procurement managers to develop their teams. Also documented are obstacles and challenges these purchasing leaders face in their efforts to develop their people. Staff development success measures, and best practice recommendations for future procurement leaders also appear in this report. Ultimately, this research aims to provide a tool for use by procurement managers as a guide to staff development.

Following the introduction to the study section, this chapter contains a summary of the study. The summary of the study highlights the purpose of the study, research questions and study design. A brief description of the study participants, interview process, and data collection process follows. The subsequent section discusses the findings of the research with both the results and a discussion on each of the four research questions. Sections discussing the implications of the study, study conclusions, and recommendations for future research follow. The initial draft of the staff development tool appears in the implications section. Closing out the report are the final thoughts of the researcher on developing procurement talent.

Summary of the Study

The purpose of this study was to determine the best practices of today's procurement managers in their staff development efforts. Informed by the literature review, the four research questions spawned 12 related interview questions to derive insights from the study's participants. Given the purpose of the research study, phenomenology was a fitting approach. Creswell (2013) stated "Phenomenologists focus on describing what all participants have in common as they experience a phenomenon…" (p. 76). Moustakas (1994) stated that the phenomenological approach leverages experience to develop an overall description as a foundation to discern the essence of the experience. Therefore, this qualitative study leveraged a phenomenological approach to discern the essence of the participant's experiences in their staff development efforts.

Industry associations and LinkedIn provided access to the study participants. Both sources are publicly available. Fifteen procurement managers participated in the study. These individuals represented five different industries and three levels of management. All had more than two years' experience, managed groups of five or more, and spent in excess of $10 million

annually. Annual purchasing ranged from $20 million to over $13 billion. There were six women and nine men. Purposive sampling with maximum variation guided participant selection and in part resulted in the diverse sample. All interviews were face to face, including 14 in-person, and one live webcast.

Semi-structured interviews were the approach leveraged for data collection from the 15 participants. Each research subject responded to the 12 interview questions. Vetting of the questions were by prima facie validity, peer-review validity and expert review. An audio recording of each interview facilitated transcription of the conversation into a Microsoft Word document. Coding of the transcripts led to the determination of common themes, reviewed and verified through an inter-rater review process. The inter-rater review led to modifications to the initial codes as noted in Table 9. Following the coding modifications, a summary of the results resulted in 12 bar graphs. The bar graphs summarize the key themes and findings derived from the coding of the interviewee's responses.

Discussion of Findings

A summary of the findings from the interviews appears in Table 12. The intent of these findings is to distill talent development best practices of procurement managers. Themes for each research question appear separately. An elaboration of the results and a discussion of the results for each question follows the table. A few themes fit under other topics but appear separately to provide greater insight into the participant's perspectives, and to align with knowledge gleaned from the literature review.

Results for RQ1. RQ1 asked, "What strategies and practices do current purchasing managers use to develop employees?" Upon analysis, ten themes emerged from the participant's

responses to RQ1. Some themes overlapped even further. As noted earlier, these themes appear separately to provide better insight to the interviewee's comments and perspective.

Table 12

Summary of Themes for Four Research Questions

RQ1	RQ2	RQ3	RQ4
transformational leadership	providing effective feedback	performance against company standards	give timely and candid feedback
emotional intelligence	managing discipline issues	customer service and comments	be servant leaders
training	transformational leadership	promotions	engage employees
resources and tools such as IDPs	provide better coaching	EQ growth of staff	set an example and show empathy
coaching	employee engagement	progress toward developmental goals/qualitative measures	leverage leadership concepts
feedback	training	self-generated performance metrics	attend training
mentoring	leveraging the right leadership concept	IDPs, reports, and other tools	
emotional safety	resource management (time)	training attended	
other leadership concepts such as Crucial Conversations	managing change	employee engagement	
succession planning	managing out underperformers	work life balance	

Note: This table is a summary of all the themes derived through the data analysis process.

The ten primary themes from RQ1 were:

- Transformational leadership (TL) – From the responses, three sub-components of a transformational leadership style were readily apparent – individual consideration, idealized influence, and inspirational motivation (Bass & Avolio, 1994). Multiple respondents discussed tailoring their strategies and practices to

each individual, leading by personal example, and efforts to inspire the staff. No

references to the fourth component of TL, intellectual stimulation, which is the

solicitation of innovation and creativity, existed in the coding of RQ1 (Bass &

Avolio, 1994). While no participants used the phrase "transformational

leadership" the theme was very apparent from numerous references to use of TL

components to develop staff. From the findings in chapter 4, transformational

leadership was one of the most important themes mentioned by participants.

Chapter 4 defines TL in greater depth along with the literature review from

Chapter 2.

- Emotional Intelligence (EQ) – Notably, multiple participants cited self-

  management of emotional responses, coaching, organizational awareness of

  cultural realities, or fostering teamwork as important staff development practices.

  These are all sub-components of EQ (Hay Group, 2011; Goleman, 1998).

  Multiple participants made specific reference to emotional intelligence both as a

  staff development practice and as a desired skill for their team to possess.

  Numerous additional references to EQ components occurred as well. From the

  findings in chapter 4, EQ was one of the most important themes mentioned by

  participants. Chapter 4 defines EQ in greater depth along with the literature

  review from Chapter 2.

- Training – Multiple participants also discussed the importance of formal and

  informal training as an employee development strategy and practice.

  Procurement certifications was a common method of training. Pairing less

  experienced team members with senior personnel was another method of training

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frequently mentioned. Other approaches cited include conferences, projects and on-the-job training opportunities. Interestingly, there were more numerous mentions of TL and EQ elements than training specific references. From the findings in chapter 4, train was an important theme mentioned by participants. Chapter 4 defines training in greater depth.

- Resources & Tools – Respondents also spoke of leveraging tools to develop personnel. Notably the use of Individual Development Plans (IDPs) received multiple comments. References to other tools, such as Learning Management Systems (LMS), or company specific development tools, occurred less frequently. A few respondents mentioned online training libraries and other repositories of training as tools to aid in staff development. Chapter 4 defines resources and tools in greater depth.

- Coaching – Since there is "no general agreement on the definition of coaching" (Rosha & Lace, 2016, p.4), for the purpose of this study coaching involves communicating with staff during a pre-defined meeting in such a manner as to help them improve job performance. Coaching appears as a stand-alone approach in addition to being a component of TL based on leadership style. Multiple references to pre-determined coaching meetings occurred. Several leaders cited "quiet hours" and other dedicated time employed to coach employees. Dedicated time coaching appears separately from the leadership style notion of "coaching" coded as TL. Multiple participants saw themselves as a performance coach for their staff, leveraging both pre-designated times in additional to providing ongoing feedback as necessary. Employment of outside personnel to provide

coaching appears separately coded as mentoring. Chapter 4 defines coaching in greater depth.

- Feedback – Feedback is communicating with candor in a direct, timely manner with a specific purpose in mind. Feedback as distinguished from coaching occurred in an ongoing, daily or weekly basis, not just at predetermined times. Multiple respondents commented on the need for timely, candid conversations on performance issues. Feedback leveraged as a corrective tool occurred regularly. The feedback theme wove through the responses to multiple questions under RQ1. Chapter 4 defines feedback in greater depth.

- Mentoring – Mentoring is a relationship between an experienced individual and a less experienced person for developmental purposes (Opengart & Bierema, 2015). Mentoring as defined in this study also involves a sustained and focused effort by an experienced person or entity outside of the direct chain of command to develop an individual over a period of time, versus shorter-term coaching efforts. Here mentoring as a stand-alone refers to specific example of ongoing coaching provided to procurement personnel by other organizational leaders not in their direct chain of command. Procurement leaders mentioned outside influencers as helpful in their efforts to develop employees. Chapter 4 defines mentoring in greater depth.

- Emotional safety – Several leaders commented on the need to establish trust and to create an emotional safe zone in which employees can admit mistakes and bring problems forward to receive assistance. Emotional safety appears as a stand-alone although not as frequently mentioned to provide insight into

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employee engagement elements. Emotional safety leverages the definition provided by Kahn (1990). Emotional safety appears both as a stand-alone and as part of employee engagement. Both Chapters 2 and 4 define emotional safety and employee engagement in greater depth.

- Other Leadership Concepts – Crucial conversations was the additional leadership concept most discussed. Other leadership concepts included Crucial Conversations, servant leadership, emotional intelligence and change management. Some leaders spoke specifically to servant leadership. When pressed, the characteristics they mentioned as servant leadership fit neatly into the definition of transformational leadership. Emotional intelligence appears frequently throughout the results. When questioned in detail about change management, none of the managers indicated use of a particular model. Some participants referred to emotional intelligence or servant leadership that frequently appeared in comments from other participants.

- Succession Planning –Some leaders were acutely aware and conversational about the need to develop staff with an eye toward succession. One leader mentioned succession planning as their staff development practice. Other leaders did not mention succession at all. Most leaders were aware of a generational shift, but not all addressed it from a succession planning standpoint in their comments. While not specifically mentioned by other participants, most interviewees indicated an awareness of a generational shift in the workplace, and the need to address the changing demographics of their teams.

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Discussion of RQ1. The results from RQ1 indicate a mature group of leaders wrestling with their personal leadership style and emotional intelligence to foster or expand upon a learning culture within their procurement organizations. Several leaders recalled use of varied leadership approaches to develop their teams, including Golden Rule leadership (do unto others as you would have them do unto you), servant leadership and Crucial Conversations. Some lamented the lack of ongoing training to help them continue to grow as leaders. As a whole, the participants employ multiple forms of training for their teams, including industry certifications, advanced degrees, special projects, conferences, support groups, internal workshops, and on the job learning. It was interesting to observe that their strategies and practices to develop employees began with their own leadership style and personal attributes, and not with staff training. The prioritization of personal style and character demonstrates the importance of setting an appropriate tone and tenor in the organizational learning culture, even over the dissemination of learning itself.

The respondents mentioned several useful tools to frame coaching sessions around staff learning needs, including IDPs, annual performance reviews, and other company-specific tools. Some respondents articulated a well-defined process of performance evaluation, skill development planning, ongoing learning, follow-up and recalibration. Others respondents spoke of a general process, but not as well defined. A few respondents lamented the lack of a consistent staff development approach at their company, and thus developed their own personal tools and approach to help their team members grow.

Timely and candid feedback was the preferred communication approach when dealing with potential performance issues. Leaders also addressed performance needs during regularly scheduled coaching sessions. Several leaders found it useful to employ others outside of the

organization to provide both emotional safety and mentoring to address the performance needs of the staff. While approaches varied, all mentioned the need for candid conversations in some form. A few mentioned the creation of emotional safety for their teams, which is a component of employee engagement (Kahn, 1990). In closing, the responses to RQ1 suggest that employee development begins with the leader's example, followed by the use of multiple tools and techniques to develop each individual according to that person's needs.

Results for RQ2. RQ2 asked, "What challenges do purchasing managers face in their efforts to develop employees?" Upon analysis, ten themes emerged from the participant's responses to RQ2. Some themes overlapped even further. These themes appear separately to provide better insight to the interviewee's comments and perspective. The ten primary themes were:

- Providing effective feedback – Providing feedback itself was not a challenge. It was providing *effective* feedback in a timely manner that was more of a challenge. Participants cited the need to manage staff expectations, notably around the tenure required for promotions of early and mid-career staff members. Several participants mentioned challenges in developing late-career staff members, some of whom alluded to or said, "I just want to be left alone." Managers made consistent efforts to address these staff development issues but indicated mixed success concerning effectiveness.

- Managing discipline issues – When necessary to address, managing discipline issues was challenging for several leaders. Challenges ranged from dealing with emotional outbursts on the part of staff members, entitlement mindsets, employees who would not accept responsibility for their actions, limited support

from human resources, and the time necessary to manage individuals on Performance Improvement (action) Plans. Managers generally addressed issues directly, but did note some challenges.

- Transformational leadership – Several leaders cited wrestling with their leadership approach as a challenge. Notably, the need to inspire, set a personal example, and craft solutions specific to the individual in question proved challenging. Working with individuals to help provide them clarity around career elements was another challenged cited. Others mentioned "people not being clear on their own [career] direction, as a leadership coaching challenge. For some leaders, the need to work differently than "what made me successful" was a growth opportunity.

- Providing better coaching – Similar to the goal to grow in personal leadership style, some leaders mentioned the more effective use of coaching sessions and "quiet hour." Leaders' engagement in staff development was clear. Also clear was the desire to improve effectiveness particularly in motivating late-career team members during coaching times. All leaders were sincere in their efforts to improve both coaching and staff development outcomes. Improved coaching tools remain an opportunity for HR and researchers.

- Employee engagement – Employee engagement was a blend of the challenges of creating emotional safety and finding meaningful growth opportunities for staff. Several participants spoke of limited promotional opportunities within their firm and the need to engage staff by leveraging outside activities such as community service projects and leadership roles in industry associations. Most commented

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on the importance of meaningful work assignments. Chapters 2 and 4 provide
greater insight into employee engagement definitions and comments.

- Training – Challenges with training centered on getting staff to attend formal
training or to participate in developmental projects. Upskilling the workforce
during a time of industry transition was also a challenge. A few participants
alluded to an inflection point of changing the staff skill composition while
balancing current organizational needs that requires some effort to navigate.
Multiple tools employed include certifications, in-house classes and
developmental assignments. Chapter 4 provides greater detail on the training
theme.

- Leveraging appropriate leadership style – Leaders mentioned attending various
trainings, but not always having success in remembering key takeaways or
applying newly acquired skills when needed. Transformational leadership is
apparent, and servant leadership comments appear as well. Both styles defined in
research have multiple elements. One key is to employ the correct element at the
right time to aid staff development.

- Resource management – Time was the most cited resource challenge mentioned
by participants. Several felt challenged managing their workload and developing
people simultaneously. Participants also noted a lack of sufficient resources to
develop employees at several of the firms involved. While from the comments
other resources, such as IDPs, LMS systems, and in-house tools exist, these
resources are not top of mind for procurement leaders. Greater insight into
resource tools appears in Chapter 4.

- Managing change – Multiple interviewees mentioned change management as a challenge. Two participants specifically mentioned a recent organizational change and the challenges of that day in managing employee morale and motivation. Morale and motivation were important factors in employee willingness to develop mentioned by multiple participants. Change as a potential detriment to success mentioned by more than one participant.

- Managing out underperformers – The topic of managing out underperformers caused noticeable discomfort for some participants. Managing out is when leaders employ direct communication with a staff member suggesting that the employee should seek opportunities outside the currently role, sometimes within the company, sometimes outside of the firm. Performance Improvement (action) Plans (PDPs) were tools some employed to manage out staffers. Managers were willing to pursue the managing out option as a last resort when other efforts to manage employee discipline issues failed.

Discussion of RQ2. Overall, the results from RQ2 indicate procurement managers grapple with the best approach to motivate and inspire employee growth and development in the face of various obstacles. The obstacles emanate both from the leader's efforts to develop themselves as well as from employee growth and development needs. In reflecting on the dual source of these challenges, periodic 360-degree feedback for managers at all levels may offer a key to growth from self-analysis, and may also provide refined motivation techniques to employ with staff members. Additional sources of challenges faced in developing employees include the rapid pace of change and limited time and other resources. There were significant differences reported by participants concerning how their organizations helped them to grapple with change

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and resource limitations. Leaders from two organizations felt their firms aggressively fostered

career development and change management through workplace policy and procedures

supportive of learning and development. Other participants lamented company rhetoric about

the importance of staff development, combined with insufficient resources to meet the learning

and development challenges. Managers in all firms took personal initiative to encourage staff

development, whether well supported by corporate or not.

One specific personnel challenge discussed by multiple participants was the need to

motivate late-career professionals to engage in learning and development activities. In addition,

several participants faced challenges in their efforts to retain and level set expectations with early

career professionals seeking rapid career advancement. A few managers faced situations in

which an employee did not respond appropriately to repeated efforts to engage in their growth

and development. The Crucial Conversations course was the most cited tool in handling

challenging talks with employees across multiple situations such as these. Most managers

simply relied on their personal convictions and experience to address such challenges. From

observation, there appears to be an opportunity to provide managers with better tactics and tools

to address common performance development challenged of today.

Results for RQ3. RQ3 asked, "How do purchasing managers measure and track success

in developing employees?" Upon analysis, ten themes emerged from the participant's responses

to RQ3. Some themes overlapped even further. These themes appear separately to provide

better insight to the interviewee's comments and perspective. The ten primary themes were:

- Performance against standards – All procurement managers discussed employee

  performance against a standard as a measure of success in developing staff. There

  were differing opinions and approaches to the definition of those standards.

Several participants articulated clearly defined expectations based on job role. Others developed a personal standard in lieu of a company standard. All had an approach they felt was comfortable. Greater detail on the performance against standards theme appears in Chapter 4.

- Customer service and customer comments – Most procurement managers looked to customer feedback as a measure of employee development. Development measures tended toward positive customer feedback and requests to work with specific buyers. Interestingly, the absence of customer feedback was also a measure of success. Providing service that was non-obtrusive to customers was a positive. Negative customer feedback warranted further investigation before drawing conclusions, but viewed as more indicative of performance opportunities instead of success measure.

- Promotions – Promotions of staff to other opportunities was universally a measure of employee development success. Several participants noted promotions were not the only measure of success in staff development. Nonetheless, they felt it was certainly one important measure. Greater detail on promotions as a performance metrics appears in Chapter 4.

- EQ growth of staff – Several managers considered staff growth in discernment and ability to influence customers as a key measure of success in employee development. Several managers indicated emotional intelligence or EQ was one of the most important measures of employee development. Interestingly, none mentioned use of EQ tools to benchmark or measure emotional intelligence.

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There is an opportunity for HR to provide additional value to practitioners in the area of EQ. Greater detail on EQ theme appears in Chapter 4.

- Progress toward developmental goals/qualitative performance measures – A common theme throughout the measure was the use of qualitative measures. Other than precise data captured in IDPs of metrics concerning training class attendance, all other measures were qualitative in nature. Qualitative performance measures appear as a separate item as several managers appeared to wrestle over the lack of quantitative performance metrics.

- Development of self-generated metrics given lack of company provided measures -- As previously mentioned, several managers developed their own metrics and standards given the lack of consistent developmental performance measures employed by their company. There is a definite gap in quantitative metrics employed to measure staff development.

- Use of IDPs and other tools – Participants mentioned IDPs and other tools as scorecards to help keep track of employee development. Progress against development objectives measured by IPDs was a recurring theme for several participants.

- Training attended – Some managers benchmarked employee attendance in prescribed or recommended training courses as a metric. Others did not push or track training, but did encourage staff to attend. All participants mentioned some form of training as a development measure, with significant variance over type of learning. The training attend theme refers solely to instructor-led or e-learning

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training courses taken by learners as opposed to developmental assignments or other avenues.

- Levels of employee engagement – Notably, employee engagement in this theme refers primarily to the employee's sense of increasing satisfaction with the job itself. Several managers look to employee job enjoyment as a development measure. Employee engagement is a broader theme occurring throughout this study.

- Staff work-life balance – One manager expressed a concern about how to measure work-life balance. Two others alluded to balance as a development metrics as well. Again, there were no definite measures, but concern regarding how to measure balance expressed. Work life balance thoughts incorporate easily into the meaningful work portion of employee engagement. The balance derives from integration of personal strengths and preferences into the work itself.

Discussion of RQ3. The results from RQ3 indicate that the participants know what success looks like, but wrestle with how to measure it. While a few had well-defined job roles with clearly stated performance and development expectations, most were evaluating performance subjectively. Generally, participants were comfortable with the subjective measures, although it was apparent that a more precise determination of developmental success was a desire. Participants viewed promotions and customer feedback as more objective measures of employee development that stemmed from evaluations by company personnel other than the procurement manager directly. Performance against standards (company or personal), and other qualitative measures were more subjective. IDPs were a useful tool to benchmark progress and performance when easy to use and part of an overall employee development and

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evaluation process. Many cited the importance of emotional intelligence, yet none spoke of

efforts to measure it. Generally, objective and consistent staff development metrics are an area

of opportunity for organizations to improve. The challenge was to integrate metrics effectively

into the existing performance evaluation and development process.

Results for RQ4. RQ4 asked, "What recommendations would current purchasing

managers give the future generation of leaders in developing employees?" Upon analysis, six

themes emerged from the participant's responses to RQ4. Some themes overlapped even further.

These themes appear separately to provide better insight to the interviewee's comments and

perspective. The six primary themes were:

- Provide timely and candid feedback – Virtually all managers indicated the

  importance of timely and candid discussion with staff members. They noted it as

  of the utmost importance, particularly when there was a performance issue.

- Servant leadership – Most leaders also spoke of the need to get to know your staff

  personally – their needs, wants, goals and dreams. Moreover, as their leader, to

  help them achieve their goals, to serve them out of a sincere desire to help, as an

  essential leadership trait.

- Engage your staff – Comments on staff engagement dealt more with the nature of

  the work, helping staff members to "find their way" from both a job role and

  career standpoint.

- Set a great example and show empathy – Most leaders advised future managers to

  "set a great example" for their staff. Several were quite passionate about the need

  to model the behavior to foster credibility with the staff. Empathy was also a

  recommendation. Leaders were clear about the need to maintain high standards

and do not accept excuses for underperformance while simultaneously showing

sincere understanding and concern in helping employees overcome performance

obstacles.

- Leverage leadership concepts – Emotional intelligence, Crucial Conversations, Influence, and Servant Leadership were the most popular leadership concepts mentioned. Whereas one leader mentioned one of these concepts earlier, other leaders mentioned these concepts in reference to providing advice to future leaders.

- Attend training – Multiple managers cited the importance of continued personal development to set a great example and to meet the leadership demands of the developing the workforce.

Discussion of RQ4. The results from RQ4 indicate that many of the recommendations appeared in earlier responses. Notably, provide feedback, leadership style, be an example, engage staff, leverage leadership concepts and train were all a part of strategies and tactics to develop staff. Indeed, the nature of the comments in response to IQ11 and IQ12 reflect saturation from earlier comments for the participants as a whole. Most respondents did not have specific action they would not "do over," but did make general comments about the importance of timely conversations when faced with challenging situations.

Implications of the Study

The goal of this study was to discern and document procurement talent development best practices employed by today's purchasing leaders. Industry literature indicates there is a skill gap in the ability of today's procurement staff to execute their company's strategy. Specifically, the literature cites talent deficiencies in leadership, innovation, and digital transformation

(Harrington, 2015; Umbenhauer et al., 2018). As supply chain complexity, digitization, globalization, and the demographic shift drive the need for skill development, it is imperative that companies address the learning and development needs of their procurement personnel (Gupta, 2019; Harrington, 2015; Strafford, 2018; Umbenhauer et al., 2018). This study on procurement talent development practices for the 21st century examines and documents the practices employed by today's procurement leaders to address staff developmental needs. As a result of this study, implications for *how* leaders approach staff development and *what framework*, if any, they use to achieve developmental goals became apparent.

How leaders approached staff development centered on leadership style, emotional intelligence, and employee engagement. Much of the research in this study examined the how of staff development. How incorporates transformational leadership components such as personal example, individualization of approach customized to each employee, and employee motivation strategies. How also includes creating an environment that is emotionally safe for employees to learn. How encompasses working actively to align employee talents and interest with job role to foster meaningfulness in the work. In addition, how involves providing timely and candid feedback to employees in a constructive manner. How also incorporates elements of emotional intelligence including self-awareness and control, social and organizational awareness, and relationship management. The discussion of the research results in the earlier portions of chapter 5 encompassed the *how* leaders approach staff development.

Each leader interviewed had a definite leadership style and personal approach to develop staff. However, not all leaders had a consistent framework through which to categorize staff development topics. Some leaders spoke of a general framework leveraging the employee annual performance evaluation from human resources. Other leaders found the annual

performance evaluation lacking categorization of developmental content, even when combined

with Individual Development Plans (IDPs). Some leaders relied on self-developed frameworks.

All leaders interviewed recognized the need to approach staff development in a thoughtful

manner. Given the variation in the use developmental frameworks, and the leader's comments

on their desire to build staff skill sets, the researcher leveraged components from the literature

review and interviews to create a staff development model. Ultimately, the model is a tool that

facilitates creation of a custom, organization specific staff development approach around a

consistent set of content topics. A procurement leadership team could easily outline the content

in each area annually, with limited support from their human resources department. A two-hour

brainstorming session with specific deliverables should yield actionable results for most teams.

The results of the model provide a list of suggested content for use in staff Individual

Development Plans (IDPs).

   Systems Technical Availability Relationships Self-Actualization (STARS) Staff

Development Model (SDM). The identification of the model's components proceeded from the

research. Leaders spoke often of various types of training. Upon closer examination, the nature

of the content fell into categories as did the emphasis depending upon career stage. Leveraging

comments from the participants around their staff development frameworks or lack thereof, and

citing industry literature, the Systems, Technical, Availability, Relationships, and Self-

Actualization Staff Development Model (STARS SDM) emerged. The definition of STARS

SDM is as follows:

- Systems are the information systems and digital platforms procurement personnel

  use today to execute their work. These systems include dynamic inventory

  management systems, automated procurement systems, (Pang, Markovski, &

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Ristik, 2019). Big data tools, artificial intelligence, and computer basics such as Microsoft Windows, and Office are additional systems content. (Gupta, 2019; Strafford, 2018). Study participants most cited systems in reference to the needs of senior personnel in their efforts to keep pace with technological change. Less cited needs for training around in-house systems for early and mid-career staff also occurred.

- Technical content includes procurement specific training such as terms and conditions, contract types, category management, procurement industry certifications, and contracts law (Institute for Public Procurement, 2018; Institute for Supply Management, 2018; National Contracts Management Association, 2018). Multiple participants mentioned ISM, NIGP or NCMA as organizations providing training and certifications. Technical staff development content was also apparent from participant comments on conferences, on-the-job training, pairing of junior and senior personnel for developmental purposes. Managers often cited the need for technical competence early in the conversation, before pivoting to other developmental needs.

- Availability leverages the definition Kahn (1990) provided – availability refers to the employee's sense of capacity to invest in the job role. "Psychological availability is the sense of having the physical, emotional, or psychological resources to engage at a particular moment" (Kahn, 1990, p. 717). From the research in this paper, availability appeared through participant comments on community involvement projects, leadership roles in procurement organizations, or work-life balance. These same themes also appear in literature related to

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leveraging corporate social responsibility and work life balance considerations to

develop employees (Fairlie & Svergun, 2015; Aguenza & Som, 2012). Multiple

participants sought to engage staff in these outside interests or to leverage

personal concerns as a staff retention or development effort.

- Relationship management refers to both soft skills and leadership development

  training. Relationship management training on how to navigate and manage the

  human element in procurement and corporate organizations. Relationship

  management includes training on emotional intelligence elements, leadership

  style, presentation, speaking, and other communication skills. Of note,

  participants mentioned the importance of relationship management skills more

  often than the need for technical training, particularly mentioned by the executive

  level. Procurement is a customer service organization, according to the study

  participants. Therefore, the ability to engage the customer effectively is a key

  success factor, inclusive of both leadership and communication skills.

  Performance challenges cited more often were indicative of relationship

  management challenges versus technical skills.

- Self-actualization leverages Maslow (1943) and in the context of this paper is

  when a procurement employee is able to realize their full potential and

  capabilities. With self-actualization congruence exists between job role and an

  employee's personal nature, and the employee feels happy and engaged in their

  work.

Table 13 further defines the STARS SDM with a graphical representation. Table 13

suggests developmental focus based on career stage. The participants spoke often of the varying

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needs of employees based on career stage and the skills or interest present or lacking at different

career stages. The *maintain* designation proposes that the staff at a particular career stage

generally has the skill set necessary in a particular area to perform satisfactorily on the job. In

order to keep pace with change, it is necessary for staff to maintain their skills. *Develop*

indicates staff need for active training, either formally or informally, to ensure the employee's

skill set is growing and building in order to perform effectively in their role. Develop is

indicative of an employee's need for growth in a particular area. *Emphasis* indicates a likely

area of a more intense developmental need or coaching focus at a particular career stage. The

designations in Table 13 derive from the researcher's interpretation of the participant's

descriptions of developmental needs at various career stages. The timeframes associated with

each career stage are estimates by the researcher based on general comments from staff

participants.

Table 13

STARS Staff Development Model – Learning and Development Priorities

Skill Development Arena	Early Career (0 – 5 years)	Mid – Career (6 – 18 years)	Late-Career (18 years+)
Systems	Develop	Develop	Develop
Technical	Emphasis	Develop	Maintain
Availability	Maintain	Maintain	Emphasis
Relationship Management	Develop	Emphasis	Maintain
Self-Actualization	Maintain	Develop	Emphasis

Additional data regarding the STARS Staff Development Model (STARS SDM) in Table

14 looks at career stage and what specific topics likely address the developmental needs of

procurement employees at that point in their career. The areas of focus derive both from

participant's comments as well as from literature cited throughout this study on procurement

talent development best practices, as mentioned in the initial definition of the STARS SDM.

Table 14 also leverages information from additional sources on employee engagement including

Field and Chan (2018) and Onken-Menke, Nüesch, and Kröll (2018). Notably, the

recommendations on sabbaticals and flexible work schedules come from these scholars.

Additional refinement on the definition of availability came from research by Fairlie & Svergun,

(2015) and Aguenza & Som, (2012). The timeframes associated with each career stage are

estimates by the researcher based on general comments from staff participants.

Table 14

STARS Staff Development Model – Learning and Development Content

Skill Development Arena	Early Career (0 – 5 years)	Mid – Career (6 – 18 years)	Late-Career (18 years+)
Systems	• Microsoft applications • Automated purchasing applications • In-house applications	• Microsoft applications • Automated purchasing applications • In-house applications	• Microsoft Applications • Automated purchasing applications • In-house applications
Technical	• Certifications • On-the-job • Internal courses • Exposure	• Certifications • On the job • Internal courses • Exposure	• Refresher courses • Teach/mentor early and mid-career staff • Advanced procurement assignments
Availability	• Benefits planning • Community outreach •	• Benefits planning • Community outreach	• Personal health & wealth • Community outreach
Relationship management	• Emotional intelligence • Influencing others	• Emotional intelligence • Crucial Conversations • Outside organization leadership roles	• Mentoring others • Outside organization leadership roles • Knowledge Transfer
Self-actualization	• Career & life planning courses • Rotational programs • Mentoring programs	• Sabbaticals	• Flexible work schedules • Sabbaticals

One practical application of the STARS SDM approach is the populating of Tables 13 and 14 during a two-hour brainstorming session by a team of procurement managers within an organization. The two-hour timeframe is less important than the completion of both tables by the end of the brainstorming session. Procurement managers cited both limited time and support resources as challenges to staff development. The devotion of one meeting annually to develop the framework for the year's staff development activities will not impose a significant burden on managers. The deliverable at the end of the meeting is the annual framework tool to help managers make staff development selections. The deliverable can help to develop IDPs for staff members.

Another practical application of the STARS SDM is the development of a laminated sheet with company specific examples of the types of training available at a company within each category. Another application is integration of the STARS SDM into an IDP form with specific courses or learning opportunities tied to developmental objectives and course availability. A third application is the use of the STARS SDM as a tool to give employees to guide their own development. These various applications can blend into an overall staff development approach. How to apply the insight from the STARS SDM is one opportunity for future study.

Finally, the STARS SDM can help both Human Resources (HR) and Academics provide additional support to line managers, in procurement and other similar service organizations. Line managers can use their operational knowledge to help HR identify links between learning and development opportunities and departmental performance. HR can leverage learning and development expertise inherent in the HR department, to assist line managers in crafting best practices learning and change management tools for execution. HR can also provide guidance to

help line managers execute effectively learning plans. HR can serve as a liaison between

academics and line managers to ensure relevance and applicability of concepts and theories to

real world organizations. Recommendations for line managers, human resources and academics

to use the STARS SDM model appear below in Table 15.

Table 15

STARS Staff Development Model – Recommendations for Line Managers, HR, and Academics

Recommendations	Line Managers	Human Resources	Academics
Systems	• Identify specific software and computer applications that staff use to execute job requirements	• Assist line managers to develop content to apply software applications training to job role for staff	• N/A
Technical	• Continue to drive job role specific technical training • Work with HR to streamline content and delivery	• Look for opportunities to assist line managers in development of eLearning modules to aid technical training	• N/A
Availability	• Help staff to leverage existing HR offerings including retirement assistance and other benefits	• Help line managers operationalize life skills assistance offered by HR. • Host events departmentally to boost staff enrollment	• Conduct research on the impact of benefits that boost staff availability on performance
Relationship management	• Use IDPs to help staff discern personal interest and strengths	• Drive company-wide emotional intelligence and soft skills training to strengthen workforce	• Develop leadership and other theories that resonate from a branding standpoint for better end-user adoption
Self-actualization	• Use IDPs to help staff discern personal interest and strengths	• Work with line managers to define self-actualization framework. • Integrate self-actualization into simple IDP tools	• Develop leadership and other theories that resonate from a branding standpoint for better end-user adoption

Study Conclusions

As a learning professional consultant to supply chain organizations, the researcher has a sincere desire to help procurement leaders effectively develop their talent. With that goal in mind, this best practices study on procurement talent development began. Given the personal interest in the topic, employment of epoche helped to preclude researcher bias. Based on data from fifteen interviews with procurement leaders, and informed by a literature review on relevant data from industry, the researcher reached the following conclusions:

1. Procurement leaders deem leadership style as critically important to staff development. Many leaders seemed unaware of the body of research on leadership style, yet were keenly aware of the importance of leadership style. While the leaders spoke of leadership style in a limited fashion in their interviews, they embodied key elements of transformational leadership including individual consideration, idealized influence and inspirational motivation. Interestingly, the intellectual stimulation component of transformational leadership, and in particular the stimulation of innovative ideas, was not a prevalent theme from the interviews.

2. Emotional intelligence was also important according to the procurement managers. Nearly every leader interviewed mentioned one of emotional intelligence's elements – self-awareness, self-management, social awareness, and relationship management (Goleman, 2018; Hay Group, 2011). Multiple participants mentioned emotional intelligence outright. Relationship management was the component appearing most often in the interview transcripts, particularly in the form of coaching and teamwork. None of the leaders articulated a specific approach on how to measure and develop emotional intelligence in others, but most mentioned the importance of EQ.

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3. The bimodal distribution of age in the workforce requires an approach crafted to each, as well as the active management of potential points of disunity between the two groups. Opportunities for mentoring and sharing of expertise across various career stages was a recurring theme among participants. Challenges in motivating staffers that are more experienced was another recurring theme. Potential approaches to solving the motivation challenge appear in the STARS model.

4. Staff development tools and metrics are lacking in some organizations, much to the chagrin of the participants. IDPs were the most chosen tools along with company-specific documents to measure employee growth and development.

5. Employee engagement is more of an outcome than a tool to drive staff development. While in literature, there is evidence of efforts to measure employee engagement, in practice these metrics seem to come more from Human Resources than from line procurement managers. Participants did mention emotional safety and meaningful work, two of the three components of employee engagement, as important in developing employees. Employee engagement elements were not as prevalent as transformational leadership and emotional intelligence factors in procurement staff development, based on comments from the participants.

Recommendations for Future Research

This study, to examine procurement talent development best practices, sought to develop a cross-industry profile across multiple levels of procurement management. As a result, the study yields general information that may not necessarily apply to a given specific situation. Nonetheless, the study is a representation of best practices employed by today's procurement

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managers to address staff performance and developmental needs. The following areas for additional research became evident because of this study:

1. Variation in staff development emphasis, strategy, and tactics based on managerial level (supervisor, manager, or executive);

2. Further development research and effectiveness measures of the STARS SDM, the rationale for differences across various career stages, and tie into organizational strategic planning vision, mission and goals;

3. Quantitative staff development measures (EQ and others) for popular concepts;

4. Industry-specific tactics and measures for staff development unique to a vertical market;

5. Application of STARS SDM to disciplines beyond procurement, and customer facing organizations in particular.

Final Thoughts

As written by practitioner, it is important that this study on procurement talent development best practices offer practical tips and tools to develop purchasing staff. As a result, the following tips appear as closing thoughts. Procurement organizations, apart for human resources, or with human resources support should:

1. Develop simple, easy to use, practical staff development tools for procurement managers;

2. The tools and staff development approach should evolve every two to three years in a two-hour update meeting attended by procurement managers. The deliverable at the end of the two hours is an updated tool. Obviously, a strong facilitator will help to achieve this goal;

3. Currently the bimodal distribution of workers with different needs requires specialized focus to help equip managers adequately to meet the developmental needs of both groups;

4. STARS SDM is likely applicable to other service-oriented, customer-facing organizations beyond procurement.

Companies must not allow the importance of leadership development and training to get drowned out by the need to achieve operational goals. Companies must both develop staff and manager performance well – to excel today AND tomorrow. STARS SDM and similar tools, hold promise to help organizations drive performance results through improved staff development activities and outcomes.

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APPENDIX A

Recruitment Script (Membership Organizations)

[Date]

Dear [Membership Organization Representative],

Greetings! My name is Charles Bray. I am a doctoral candidate in Pepperdine University's Graduate School of Education and Psychology. I am researching talent development practices employed by today's procurement managers.

I plan to share the results of my research with the member organizations, corporations and individuals that participate in my study. Industry literature indicates that companies have a pressing need to develop the skill level of their procurement staff. My hope is to glean insight into the best practices employed by today's procurement managers to develop their people, and to share these revelations and ideas across participating organizations.

Respectfully, I request that your organization provide contact information for corporate representatives of your local members. My plan is to contact the corporate representative and request the participation of their organization in my study. I will also use public sources of information, such as corporate websites and linkedin.com to source additional participants for the study.

All individual information will be held confidentially. Only aggregate results will be reported in the study. I will follow this letter with a phone call to determine the level of interest of your organization.

Thank you for your time and consideration. I hope to speak with you soon.

Respectfully,

Charles E. Bray, Jr.
Pepperdine University
Graduate School of Education and Psychology
Doctoral Candidate

APPENDIX B

Recruitment Script (Corporate Representative to Membership Organization)

[Date]

Dear [Corporate Representative],

Greetings! My name is Charles Bray. I am a doctoral candidate in Pepperdine University's Graduate School of Education and Psychology. I am researching talent development practices employed by today's procurement managers.

I plan to share the results of my research with the member organizations, corporations and individuals that participate in my study. Industry literature indicates that companies have a pressing need to develop the skill level of their procurement staff.   My hope is to glean insight into the best practices employed by today's procurement managers to develop their people, and to share these revelations and ideas across participating organizations.

Respectfully, I request that several procurement managers from your organization participate in the study. If your organization is willing, I request the email addresses of up to 10 procurement managers from your organization that I may request their participation. For your information, I will also use public sources of information, such as corporate websites and linkedin.com to source additional participants for the study.

All individual and corporate information will be held confidentially. Only aggregate results will be reported in the study. I will follow this letter with a phone call to determine the level of interest of your organization.

Thank you for your time and consideration. I hope to speak with you soon.

Respectfully,

Charles E. Bray, Jr.
Pepperdine University
Graduate School of Education and Psychology
Doctoral Candidate

APPENDIX C

Recruitment Script (Individual Procurement Managers)

[Date]

Dear [Procurement Manager],

Greetings! My name is Charles Bray. I am a doctoral candidate in Pepperdine University's Graduate School of Education and Psychology. I am researching talent development practices employed by today's procurement managers.

I plan to share the results of my research with the member organizations, corporations and individuals that participate in my study. Industry literature indicates that companies have a pressing need to develop the skill level of their procurement staff.   My hope is to glean insight into the best practices employed by today's procurement managers to develop their people, and to share these revelations and ideas across participating organizations.

Respectfully, I request the opportunity to interview you at your convenience at your office. The interview would last for approximately one hour. I will send the research questions and an Informed Consent form to you in advance of our appointment for your review should you agree to participate in the study.

All individual and corporate information will be held confidentially. Only aggregate results will be reported in the study. Please reply to this email that I may determine your level of interest and provide additional information about this study.

Thank you for your time and consideration. I hope to hear from you soon.

Respectfully,

Charles E. Bray, Jr.
Pepperdine University
Graduate School of Education and Psychology
Doctoral Candidate

APPENDIX D

Informed Consent Form

IRB #: 18-06-815

Study Title: Doing It Right: Developing Procurement Talent for the 21st Century

Principal Investigator: Charles E. Bray, Jr., Doctoral student   Mobile (310) xxx-xxxx.

Dissertation Chair: Dr. Farzin Madjidi, Office (310) 568-5600.

Academic Program: Pepperdine Graduate School of Education and Psychology (GSEP)

Key Information:

You are invited to participate in this research study. The information in this form is meant to help you decide whether or not to participate. If you have any questions please ask.

You are being asked to be in this study because you meet or exceed the participant criteria as noted below. You must be 19 years of age or older to participate:

1. Direct supervisory experience of a team of at least five procurement personnel within the last two years;
2. A minimum of two years of experience in the supervisory role;
3. A minimum purchase amount of $10 million in goods and services annually during the qualifying time frame;
4. Active involvement in procurement personnel management, training and development.

The purpose of this study is to uncover the best practices used by today's procurement leaders to develop the next generation of talent. Literature pertaining to procurement and talent development will help to develop a baseline for the research. Interviews, notes, and memos will broaden the body of knowledge and help to frame the analysis in this study on procurement talent development for the 21st century. Peer review will serve to guide the interpretation of the data to minimize researcher bias. Guided by comments from interviews, peers and relevant literature, this study will contribute to the body of knowledge by providing insight into procurement talent development best practices during a demographic shift in the early 21st century.

You will be asked to grant a 1-hour interview you at your convenience at your office or other mutually agreed upon location. The interview questions and an Informed Consent form will be sent to you in advance of our appointment for your review should you agree to participate in the study.
All individual and corporate information will be held confidentially. Only aggregate results will be reported in the study as the researcher will look for common themes and trends from the interviews. The researcher will redact any identifiable personal or corporate information from the data.

This research does present the potential for a risk of loss of confidentiality, emotional and/or psychological distress from the interview in your office environment from the discussion of your talent development approach. The researcher will work with you to address any issues of distress and to mitigate the potential of a confidentiality breach.

The benefits of this study will contribute to the body of knowledge of leadership and employee development through a specific focus on procurement managers and personnel. There is a current shortage of procurement talent globally. This study seeks to document current best practices employed by procurement managers to share with future leaders. Procurement has a direct impact on a company's profitability and viability. This study seeks to improve the practice of talent development in procurement. There are no direct benefits to participants. The researcher will share the results with all interested participants. You have the right not to participate in this study. There is no cost to involvement in this study.

If at any time you are uncomfortable or wish to no longer participate in this study you have the right to end your participation. If you have a problem as a direct result of being in this study, you should immediately contact one of the people listed at the beginning of this consent form.
Reasonable step will be taken to protect your privacy and the confidentiality of your study data. There is always the potential for theft of electronic information leading to a breach of confidentiality. The researcher will take precautions such as lock codes, firewalls, and other forms of coding to protect the subject's confidentiality. The researcher will use a code known only to himself to preclude a breach of identification. The researcher will keep the code key in a locked safe in his office. The key will be destroyed once all information has been encoded and after discussion with his committee. The other risks are those normally associated with working in an office environment. The researcher will note the office environment of the participant and actively work to mitigate any unforeseen risks that may arise

The only persons who will have access to your research records are the study personnel, the Institutional Review Board (IRB), and any other person, agency, or sponsor as required by law. The information from this study may be published in scientific journals or presented at scientific meetings but the data will be reported as group or summarized data and your identity will be kept strictly confidential.

You may ask any questions concerning this research and have those questions answered before agreeing to participate in or during the study. For study related questions, please contact the investigator or dissertation chair listed at the beginning of this form. For questions concerning your rights or complaints about the research contact the Institutional Review Board (IRB):
• Phone: 1(402)472-6965
• Email: gpsirb@pepperdine.edu

You can decide not to be in this research study, or you can stop being in this research study ("withdraw') at any time before, during, or after the research begins for any reason. Deciding not to be in this research study or deciding to withdraw will not affect your relationship with the investigator or with Pepperdine University (

You are voluntarily making a decision whether or not to be in this research study. Signing this form means that (1) you have read and understood this consent form, (2) you have had the consent form explained to you, (3) you have had your questions answered and (4) you have decided to be in the research study. You will be given a copy of this consent form to keep.

As part of Pepperdine University's ongoing accreditation efforts, the Association for the Accreditation of Human Research Protection Programs (AAHRPP) standard I-4: The Organization responds to concerns of research participants, encourages the HRPP to conduct evaluation or research participant satisfaction. In order to meet this standard, we have created an online feedback survey. All

investigators are now required to include the following statement and survey link in all written informed consent information documents.

Participant Name:

_____
(Name of Participant: Please print)

Participant Signature:

_____   _____
Signature of Research Participant   Date

Investigator Signature:

       I have explained and defined in detail the research procedure in which the subject has consented

to participate. Having explained this and answered any questions, I am cosigning this form and accepting

this person's consent.

Principal Investigator	Date

APPENDIX E

IRB Approval Notice

PEPPERDINE

NOTICE OF APPROVAL FOR HUMAN RESEARCH

Date: January 22, 2019

Protocol Investigator Name: Charles Bray

Protocol #: 18-06-815

Project Title: Doing It Right: Developing Procurement Talent for the 21st Century.

School: Graduate School of Education and Psychology

Dear Charles Bray:

Thank you for submitting your application for exempt review to Pepperdine University's Institutional Review Board (IRB). We appreciate the work you have done on your proposal. The IRB has reviewed your submitted IRB application and all ancillary materials. Upon review, the IRB has determined that the above entitled project meets the requirements for exemption under the federal regulations 45 CFR 46.101 that govern the protections of human subjects.

Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit an amendment to the IRB. Since your study falls under exemption, there is no requirement for continuing IRB review of your project. Please be aware that changes to your protocol may prevent the research from qualifying for exemption from 45 CFR 46.101 and require submission of a new IRB application or other materials to the IRB.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite the best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the IRB as soon as possible. We will ask for a complete written explanation of the event and your written response. Other actions also may be required depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the IRB and documenting the adverse event can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* at community.pepperdine.edu/irb.

Please refer to the protocol number denoted above in all communication or correspondence related to your application and this approval. Should you have additional questions or require clarification of the contents of this letter, please contact the IRB Office. On behalf of the IRB, I wish you success in this scholarly pursuit.

Sincerely,

Judy Ho, Ph.D., IRB Chair

cc: Mrs. Katy Carr, Assistant Provost for Research

APPENDIX F

Peer Review Form

Dear Reviewer:

Thank you for agreeing to participate in my research study. The table below is designed to ensure that

may research questions for the study are properly addressed with corresponding interview questions.

 In the table below, please review each research question and the corresponding interview questions. For

each interview question, consider how well the interview question addresses the research question. If the

interview question is directly relevant to the research question, please mark "Keep as stated." If the

interview question is irrelevant to the research question, please mark "Delete it." Finally, if the interview

question can be modified to best fit with the research question, please suggest your modifications in the

space provided. You may also recommend additional interview questions you deem necessary.

Once you have completed your analysis, please return the completed form to me via email to

Charles.bray@pepperdine.edu. Thank you again for your participation.

Research Question	Corresponding Interview Question
RQ1: Placeholder	Placeholder a. The question is directly relevant to Research question **- Keep as stated** b. The question is irrelevant to the research question – **Delete it** c. The question should be **modified as suggested**: _____ _____ I recommend adding the following interview questions: _____ _____ _____

RQ2: Placeholder	Placeholder
	a. The question is directly relevant to Research question **- Keep as stated** b. The question is irrelevant to the research question – **Delete it** c. The question should be **modified as suggested**: _____ _____ I recommend adding the following interview questions: _____ _____ _____
RQ3: Placeholder	Placeholder
RQ4: Placeholder	Placeholder