2022

Thriving in a VUCA world: a case study exploring geopolitically-focused intelligence teams in the private sector through a systems theory lens

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THRIVING IN A VUCA WORLD: A CASE STUDY EXPLORING GEOPOLITICALLY-FOCUSED INTELLIGENCE TEAMS IN THE PRIVATE SECTOR THROUGH A SYSTEMS THEORY LENS

A dissertation submitted in partial satisfaction

of the requirements for the degree of

Doctor of Philosophy in Global Leadership and Change

by

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July, 2022

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DEDICATION

American lawyer and politician Brad Henry once said, “Families are the compass that guide us. They are the inspiration to reach great heights and our comfort when we occasionally falter.” My family has been all of this to me—and more, and I could not have accomplished this educational endeavor if not for their enduring support and encouragement.

To my phenomenal daughter, Hannah: your joy and resilience have made parenting you more than I could have ever asked for or imagined. Thank you for your laughter and your patience as I tried to balance motherhood, academia, and the professional world. Making sure you always came first gave me the perspective I needed to stay the course. I am so proud of you.

To my brother, who set a high bar for us all: thank you for never settling for the status quo and for pushing me to always consider things from a different perspective. Just knowing that I have you in my corner makes me the luckiest sister in the world.

To my incredibly strong and courageous sister: thank you for being my sister *and* one of my best friends. Watching you tackle life with grit and grace is an inspiration. Thank you for being there from the depths to the heights and everywhere in between.

And to my mom, my stalwart supporter: thank you for being the solid foundation that allowed me to build this dream. It is because of your love and support that I see “home” as a feeling and a family, rather than a place.

And finally, this work is dedicated in loving memory of my father, whose legacy left an indelible mark on my life that has influenced everything that has come since. It was his strategic perspective that was teaching me about Systems Theory long before I knew what it was.

“There are two things children should get from their parents: roots and wings.” (Proverb ascribed to Johann Wolfgang Von Goethe)

ACKNOWLEDGEMENTS

For me, the doctoral journey has been a time of incredible growth, and I am so thankful it was not a journey that I took alone.

To my “inner circle”, thank you for being my sounding board, my editors, and most importantly, my friends. Your encouragement, support, creativity, and humor made balancing all of my responsibilities possible. Thank you for never settling for the status quo. And a special thank you to my dear friend Jenn for always reminding me of the bigger picture – for asking the difficult questions, for scanner hilarity, and for being my “coparent”.

To my Pepperdine GSEP faculty and my GSEP cohort (and in particular Mourad, Natasha, Michele, and Stephanie): thank you for seeking to change this world for the better – you are all an inspiration to me. And to the cohort we created – Maria and Lewis: I cannot thank you enough for our stream-of-consciousness conversations, your support, your curiosity, your humor, and your friendships. Climbing this mountain alongside the both of you has been an honor.

To my professional network – including all of those who contributed to this study, whether through responding to the questionnaire, coding, asking questions that spurred my research, giving me a platform to share what I’ve learned, or simply providing your encouragement and support. I am grateful for you.

To my mentors Linda, Arlin, and Darrell, and many, many more – thank you for investing in me. I can only hope that I can pay forward all that you’ve given to me.

And finally, to my committee – Dr. Martine Jago, Dr. Paul Sparks, and Dr. David Wills – I am truly thankful for your wisdom and encouragement and for so generously giving of your time. Your guidance as I have navigated this path has been invaluable.

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ABSTRACT

For several decades, business executives have been faced with increasing complexity in the global environment, including disruptions, rapid changes, and heightened global pressures. In an effort to maintain a strategic advantage, business leaders are increasingly leveraging geopolitically-focused strategic intelligence teams to accurately and concisely synthesize large quantities of data to support high-level business decision making. However, limited research has been conducted on the organizational development of these teams, the context in which they exist, and how they can most effectively support differing and evolving decision-maker needs. As these teams have the potential to have an outsized impact on global business decision making, this qualitative case study sought to explain, using a systems theory lens, the interdependence of the components involved in building and leveraging geopolitically-focused intelligence teams in U.S.-based private sector MNEs.

This case study leveraged a multi-method approach consisting of 3 parts: (a) interviews with 15 former intelligence team members at one large multinational corporation, (b) review of key organizational and policy-oriented documents that guided this team's operations, and (c) a questionnaire deployed within the private sector intelligence community. The research question guiding this inquiry was: How, if at all, does systems theory explain how geopolitically-focused intelligence teams operate in the private sector? In addressing this research question, the findings and conclusions of this study revealed equifinality and alignment with a systems theory approach; key skills critical to success in the field; and significant barriers that are common throughout the field.

Keywords: equifinality, geopolitical intelligence, leadership, leadership development, learning organizations, organizational culture, qualitative analysis, systems theory, team building

Chapter 1: Introduction

Chapter Overview

This introductory chapter describes the background of this case study and develops the conceptual and theoretical framework that served as its foundation. This chapter also defines the key concepts used as a basis for this research. The sections of this chapter include: Background of the Study, Problem Statement, Purpose Statement, Significance of the Study, Definition of Terms, Conceptual Framework, Theoretical Framework, Research Questions, Limitations, Delimitations, Assumptions, Positionality, Organization of the Study, and Chapter Summary.

Background of the Study

Organizations that exist in a complex and challenging global marketplace often struggle to operate effectively for a myriad of reasons, including acquiring and developing strong leaders (Bono et al., 2009; Douglas & Morley, 2000), a scarcity of on-demand skills, and a rapidly changing and often uncertain business context (Foote et al., 2021). A 2021 McKinsey study that took place during the COVID-19 global pandemic showed that "responsive organizations outperformed their less agile peers by pivoting teams to solve new problems as they arose" (Handscomb et al., 2021). Private sector intelligence teams typically have a skillset that supports this responsiveness and agility by operating across two disparate domains. In one sense, they serve as an advisor or business partner, working among multiple teams. Although these teams complete discrete projects, these projects are one element of a broader responsibility for providing continuing and trusted advice. The second domain that these teams operate in is that of the knowledge professional. These teams typically either have or quickly develop deep content expertise similar to that of a center of excellence. In this sense, they also operate across multiple teams, providing "targeted research and content expertise" (Foote et al., 2021, p. 4).

In light of the growing complexity within the global business environment, business leaders are increasingly leveraging geopolitically-focused strategic intelligence teams to capitalize on their deep content expertise and advisory capabilities to guide business decision making. Effectively leveraging these intelligence teams allows many organizations to be responsive and agile in addressing new problems as they arise. However, because the private sector intelligence field is in its nascent stages, there is limited understanding of how these teams operate and how they can most effectively support differing and evolving decision-maker needs within a single organization.

When defining strategic intelligence, Clough (2004), stated that strategic intelligence is a "mechanism to predict threats to a nation's stability and security, be they military, political, economic, environmental, or societal" (p. 602). These same elements can be applied to a multinational enterprise (MNE) operating in a volatile or uncertain political or economic environment. According to Fahey and Herring (2007), "An intelligence team is a group of individuals who work together to develop a deep understanding of a specific business issue with the intent of developing strategy-relevant insights, action possibilities, and recommendations" (p. 15). Fahey and Herring further noted that team members are drawn from diverse functional departments or organizational units charged with generating insights that "add significant value to decision making" (p. 17). Both Clark (2004) and Barnea (2020) also highlighted the role of intelligence in gathering information regarding changes taking place in the external environment to support the decision-making process to avoid surprises. Robson (2022) defined intelligence in the private sector as "applying intelligence analysis on external operating environments legally and transparently to facilitate strategic decision making and mitigate geopolitical and security risks" (p. 5). Robson's definition aligns well with the definition espoused by Wheaton and

Beerbower (2006), who argued that intelligence is an externally-focused process that uses information from all available sources and is designed to reduce uncertainty for a decision maker. In short, according to Wheaton and Beerbower, intelligence is more than just information; it is something that is done to information that provides assurance to decision makers. Thus, while there is much variance in the field, the overarching role of the intelligence professional is arguably to facilitate strategic decision making by reducing the decision maker's uncertainty (Gill et al., 2009).

This definition is most useful in understanding the utility of strategic intelligence in the private sector, particularly for MNEs. Much of the existing literature on intelligence addresses it within the public sector domain. For example, Warner (2002) argued that intelligence requires secrecy and falls solely in the domain of nation-state actors, and Lowenthal (2017a) defined intelligence as:

> The process by which specific types of information important to national security are requested, collected, analyzed, and provided to policymakers; the products of that process; the safeguarding of these processes and this information by counterintelligence activities; [and] the carrying out of operations as requested by lawful authorities. (p. 10)

However, defining intelligence more broadly by its purpose in facilitating strategic decision making establishes the mission and purpose of strategically-focused geopolitical intelligence teams in the private sector to synthesize a broad array of externally-focused information in such a way that it minimizes uncertainty to the extent possible and therefore supports decision makers as they make reasoned, insightful, and context-specific decisions.

In early private sector intelligence literature, Kilmann and Ghymn (1976) argued that an effective MNE must have a specially-designed strategic intelligence system to monitor complex

and changing international environments. According to Robson (2022), although intelligence tradecraft has been rapidly expanding in the private sector since the early 2000s, the field is still early in its development. Robson identified six key indicators of professionalization, including "(1) a shared identity, (2) a body of knowledge and knowledge advancement, (3) an accepted code of ethics, (4) agreement on competencies and standards, and (5) training and education, and, finally, (6) certification and licensing" (p. 3). Robson further noted that although some of these elements are emerging in the private sector intelligence field, overall professionalization within the field remains in its nascent stages.

Focused primarily on security risk mitigation and facilitating business decision making, these private sector intelligence teams comprise a transnational community that represents airlines, banks, academia, retail companies, nonprofit organizations, and major league sports, among others (Robson, 2022). Matey (2013) argued that intelligence has evolved from a tool of national defense to a tool used by private sector businesses. Much of the literature on intelligence is predicated upon the public sector, which neglects the divergent requirements of the private sector (Sage-Passant, 2021). For example, according to Theodorou (1993), "The fundamental difference between public- and private-sector intelligence lies not in the raw data and the analytical methodology, but rather in the interpretation for its end use" (p. 147). Theodorou further explained that in the public sector, intelligence is focused on national security interests. In the private sector, however, the purpose of intelligence can range from personnel security interests for business persons and operations to brand and reputational risks (Crump, 2015). Budgets can also vary quite widely, not only between the public sector and the private sector, but also within the private sector, depending on business segment, size, and purpose. In the public sector, intelligence functions are publicly financed, operating in a not-for-profit setting.

Meanwhile, in the private sector, intelligence professionals operate in a for-profit setting, though they typically exist in an organizational cost center (Ard, 2022). Ard (2022) further described the differences between intelligence in the public and private sectors, noting that in the public sector, intelligence teams typically operate in bureaucratic and hierarchical structure, while private sector teams tend to have a flatter hierarchy. Intelligence duties in the public sector are well-defined and predictable, and intelligence customers comprise an established community of policy makers. In the private sector, however, duties are defined, but highly flexible, and the client base in many firms is not well-established. Differences also exist in the information sources leveraged, work environment, and job security in each sector. For example, in the public sector, both classified and open sources may be leveraged; the work environment is collaborative internally, but information sharing and cooperation is limited externally; and job security is stable. In the private sector, intelligence is derived almost exclusively from openly available (unclassified) sources; the work environment tends to be independent internally and collaborative externally; and job stability is contingent on providing intelligence that is timely and relevant to business needs. Finally, while politicization or the intentional slanting of analysis to influence a decision is generally seen as unacceptable in the public sector, the concept of politicization has limited meaning in the corporate context, because the intent of intelligence is tied to achieving corporate objectives (Ard, 2022). Scholar-practitioner Sage-Passant concurred with Ard's assessment of the differences in information sharing between the private and public sectors, noting that, "where intelligence sharing and liaison between state intelligence agencies - especially those of other nations - is highly regulated and only occurs in specific circumstances given the often adversarial relationships states maintain with one another, in the private sector, intelligence sharing - even between companies that are bitter commercial rivals - is

commonplace, albeit with secrecy restrictions maintained around commercially sensitive information" (L. Sage-Passant, personal communication, 28 April 2022).

Despite the divergence in potential uses of intelligence, one commonality between the two sectors is the intent to reduce uncertainty for decision makers. Fingar (2011) noted that "the ultimate goal for intelligence is to provide insights and signposts for policy makers, providing as much color as possible, in order to facilitate better decisions" (p. 99). Both the public and the private sectors also face the challenge of a lack of a single agreed-upon definition of intelligence (Wheaton & Beerbower, 2006). This lack of consensus on a definition of intelligence—in either the public or the private sector—has led to significant variance in the roles and responsibilities of intelligence professionals in the private sector by business sector, objective, and organization. Regardless of business sector, however, these teams typically work in a challenging and unique setting characterized by ongoing change and uncertainty, known as a volatile, uncertain, complex, and ambiguous (VUCA) environment (Bennis & Nanus, 1985). While most private sector strategic intelligence professionals are not epidemiologists, the COVID-19 pandemic brought to the fore the VUCA context in which these professionals have long operated.

> VUCA (volatility, uncertainty, complexity, ambiguity) has been in the business vocabulary for over 30 years, and yet we've seldom been confronted with the degree of uncertainty we're now facing with the COVID-19 pandemic. Where next? How bad? How long? Who can we rely on for the latest and most reliable information? How will our organization - our employees, customers, partners, supply chain - be impacted? How should we respond?...The threat is evolving, and leaders are recognizing that they will have to respond and make adjustments in real time. (Foster, 2020, paras. 1-2)

This is equally true of other types of threats, as well. Geopolitical threats such as crime, terrorism, and economic and political instability all pose significant risks to global businesses and require business leaders to choose their sources of information wisely to remain flexible, to make effective decisions, and to communicate clearly amidst uncertainty (Hackman & Johnson, 2013). The COVID-19 pandemic has exacerbated this uncertainty and has highlighted the need for accurate, reliable, and timely information to mitigate uncertainty, so that business decision makers can operate effectively in this complex environment.

Problem Statement

For several decades, global executives have been faced with the challenge of heightened complexity in the global environment, including disruptions, rapid changes, and increased global pressures (Brotman et al., 1998; Schlosser et al., 2006). In light of this challenge and in an effort to maintain a strategic advantage, business leaders are increasingly leveraging geopolitically-focused strategic intelligence teams to accurately and concisely synthesize large quantities of data to support significant, high-level business decision making. Airlines, sports leagues, retail establishments, media and entertainment companies, restaurants, and oil and gas firms have all established these types of intelligence teams in an effort to leverage their capabilities to strengthen business decision making (Robson, 2022).

Nevertheless, because the private sector intelligence field is in its nascent stages, limited research has been conducted on the organizational development of these teams, the context in which they exist, and how they can most effectively support differing and evolving decision-maker needs within a single organization. Moreover, intelligence teams were originally developed to support governments as they seek a strategic advantage over their adversaries—whether diplomatically, politically, or militarily (Dokman, 2019; Tzu, 2010). As such, the extent

to which these teams can provide a strategic advantage in the private sector remains unclear, despite the potential for knowledge regarding obscure trends or cultural nuances to have an outsized impact on global business operations (Kilmann & Ghymn, 1976). In many cases, professionals tasked with building and leading these teams have moved from the public to the private sector, and being relatively new to the private sector and having limited understanding of the business needs of their new company, they rely on the structure and strategies that they are familiar with from their public sector experience and background.

Therefore, given the potential impact that these teams can have on business operations globally, it is critical that these teams be properly focused and adequately equipped to provide the critical intelligence these business leaders need. Their leadership must also be prepared to address the myriad organizational elements that facilitate or undermine their effective functioning. Those who seek to leverage these teams must also recognize the geopolitical and organizational contexts that also influence these teams' internal systems dynamics.

Purpose Statement

The purpose of this case study was to explain, using a systems theory lens, the interdependence of the components involved in building and leveraging geopolitically-focused intelligence teams in U.S.-based private sector MNEs. Given the potentially outsized impact that geostrategic intelligence teams can have on critical business decisions and the position of influence that analysts hold with regard to decision makers in large multinational corporations, understanding the scope of a geostrategic intelligence team's responsibilities – and how best to leverage their capabilities – will help to maximize their contributions to corporate security and, relatedly to corporate revenue streams.

Key to the purpose of this research was the use of a systems theory lens, which helped to narrow the scope of the study. Systems theory was selected because it is broadly applicable, with concepts and principles that span multiple domains of knowledge (Bertalanffy, 1972). It is a transdisciplinary field that aims to explain the behavior of complex, organized systems, regardless of domain (Whitchurch & Constantine, 2009). As such, it has applicability across multiple sectors within in the business space, which is where these teams are situated. It also helped to bring a holistic view to these teams, which allowed for a widening of the aperture on the field, since the study of this field is rather nascent, and this study sought to understand the various components of a private sector intelligence team and explain how they work together, rather than to dive too deeply into any one element. A systems theory approach also supports the concept of equifinality–that there are many different means of reaching an optimal result, which allows for the nuances and flexibility that are necessary for the functioning of these teams. The purpose also addressed both the building and leveraging of these teams. There are a number of companies that either have these teams, but their team is underleveraged, or else do not have fully-developed intelligence programs, but are interested in building one. Many of the considerations for how to go about building and these teams are also relevant to leveraging them, as both phases are ultimately seeking to optimize.

Significance of the Study

MNEs play a significant role in the broader global context. According to a 2016 study of the top 100 revenue generators globally, 71 were corporations, rather than nation states (Babic et al., 2018). Given their expertise and understanding of business requirements, geopolitically-focused intelligence teams embedded within these organizations have the potential to have an outsized impact on executive decision-making within these organizations. However, despite the

potential impact of these teams, private sector intelligence is a relatively nascent field, and there are several misperceptions about the work these teams do. Beliefs about these teams include involvement in commercial espionage and government outsourcing, yet there is limited literature discussing the strategic importance of reliable intelligence for business decision making or the development or professionalization of the field (Sage-Passant, 2021). In their recently-published book, *Political Risk: How Businesses and Organizations Can Anticipate Global Insecurity*, Rice and Zegart (2018) described the utility of geopolitical intelligence for businesses seeking to operate on a global scale, noting the increasingly unpredictable global context within which businesses must conduct their operations. While the book provided a robust discussion of the "what"– what intelligence is and what benefit it provides to business decisionmakers–what is missing in the literature to this point is the "how". This is the gap that this research addresses: how these teams operate and how these teams are influenced, engaged, built, and leveraged.

This study aimed to provide valuable insights to corporate security executives as they consider how best to build and leverage these teams to support business operations and high-level decision making. Senior level business executives and security practitioners alike can benefit from understanding the potential value and scope of these teams and the ways in which they can mitigate risk and uncertainty, help business operations operate more effectively, and avoid potential reputational missteps. This type of study is particularly relevant to private sector intelligence practitioners and professional organizations such as the Association of International Risk Intelligence Professionals (AIRIP) as these individuals and organizations seek to move the private sector intelligence field towards professionalization. Further, through identifying the various components that serve as a framework for the work these teams do, more effective professional and leadership development can be established. Improved alignment across the

overarching system can also be leveraged to improve organizational culture within these teams. While many strategic intelligence professionals serve within the security function, their geostrategic knowledge may present opportunities beyond the security realm, including informing key business decisions in areas such as investments, strategy, mergers and acquisitions, or corporate social responsibility. Conceptually, harnessing the strategic and cultural perspectives and regional expertise embedded within these intelligence teams will have the potential to make business decisions more thoughtful and productive—and potentially more profitable.

Further, as the prevalence of undergraduate- and graduate-level intelligence studies programs increases at colleges and universities across the United States and throughout the world (Lowenthal, 2017b), program directors and students, as well as corporate human resources leaders may also benefit from an improved understanding of the considerations that go into the staffing and skills that are relevant to private sector roles in intelligence. Because the private sector intelligence field has generally lacked standardization in job requirements (Robson, 2022), academic programs focused on intelligence studies have historically aimed to prepare students for public sector jobs. However, interest has been increasing in private sector opportunities, making a study of the field and the components associated with building and leveraging these teams of heightened interest.

In order to maximize the benefit that corporations can derive from intelligence teams, these organizations have an added responsibility to develop the skills of private sector intelligence practitioners in order for leaders to receive the best possible information and to limit bias. One of the most pressing challenges in the field of global intelligence—in either the private or the public sector—is how best to develop these individuals to facilitate their success and thus

the success of the business executives they support. Taking a systems approach to understanding–and explaining–how these teams function allows for a holistic view, and given these teams' experience in understanding decision-making frameworks and distilling vast amounts of information into useful and relevant content while mining a myriad of resources for significant insights, these individuals are well-positioned to evolve into future leaders.

Finally, successful and stable MNEs can lead to increased stability on the global stage, and the extensive knowledge and well-developed analytic acumen of many of these intelligence professionals can be leveraged to this end. According to *Fortune*, in 2019, the world's 500 largest companies generated $33.3 trillion in revenues and $2.1 trillion in profits ("Global 500", 2020). Those companies on the 2020 list of *Fortune*'s Global 500 companies employ 69.9 million people worldwide and are representative of 32 distinct countries ("Global 500", 2020). MNEs contribute to over 64% of nongovernmental jobs in host nations (Tirimba & Macharia, 2014) and play a significant role in channeling financial and physical wealth, encourage expansion into foreign territories, and encourage developing nations to invest in infrastructure to provide increased security and to strengthen human capital (Isaac et al., 2020). However, according to the United Nations Development Programme (UNDP; 2019):

> Business experts predict that top performing global companies will be those that reach out to new markets while simultaneously addressing some of the world's biggest social and environmental challenges. Demographic shifts and automation are already changing the global workforce, presenting both new opportunities and risks. (para. 2)

For example, through increased efficiency in capital flows, MNEs can help to reduce world poverty and can serve as a positive externality, encouraging nation state actors to seek peaceful resolutions to both internal and external conflicts (Nye, 1974; Quinlivan, 2005). According to

Neto (2019), “Multinational companies have immense power to tackle global challenges such as poverty, climate change and gender inequality. They have the ability to transform low-income markets and help lift millions—even billions—out of poverty” (para. 1). While there is much debate regarding the positive and negative aspects of the power MNEs exercise in the global economy, their reach and impact—both on a societal and on an economic level—is clear. In order for these organizations to stay at the forefront of these demographic shifts and maintain an edge when assessing which new markets to enter in an ever-changing global landscape, access to timely, accurate, and reliable information is critical to decision making. As such, these private sector intelligence teams have the potential to play a critical role in ensuring the success of MNEs as they address challenges within the global landscape.

Definition of Terms

Key terms used throughout this study are listed alphabetically below, along with their definitions.

Geopolitical: The field of geopolitics typically addresses how political power is undermined or reinforced by practical decisions by political and social leaders within geographical boundaries and networks (Dijkink, 2009). As such, key geopolitical issues include political and economic stability, terrorism, crime, and civil unrest, amongst others.

Intelligence: For the purposes of this study, intelligence is defined as the provision of strategic analytic insights about “external operating environments to facilitate strategic decision making and mitigate geopolitical and security risks” (Robson, 2022, p. 5). This refers to information that is acquired legally and transparently, through all available sources, designed to reduce the level of uncertainty for a decision maker (Gill et al., 2009; Wheaton & Beerbower, 2006).

Multinational enterprise (MNE): Multinational enterprises, also known as multinational companies (MNCs) or simply "multinationals," can be defined as firms that hold assets or employees—or control value-added activities—and engage in foreign direct investment (FDI) in more than one country (Dunning & Lundan, 2008; Mayrhofer & Prange, 2015). MNEs exist in a variety of forms, ranging from smaller companies that invest abroad to large corporations that manage subsidiaries in several countries. MNEs are often integrated into multiple networks that may evolve over time depending on the local operating environment (Hennart, 2009).

Organizational culture: According to Schein (1990), organizational culture comprises a shared "pattern of basic assumptions" (p. 111) that group members acquire over time as they learn to successfully navigate internal and external organizational challenges.

Private sector intelligence teams: A private sector intelligence team is an MNE's specially-designed strategic intelligence unit that monitors complex and changing international environments (Kilmann & Ghymn, 1976); it seeks to provide strategic analytic insights about these international environments to business leaders and to reduce their uncertainty to aid in decision making (Gill et al., 2009). Although there are a number of different types of intelligence teams, including those who provide protective, market, tactical, competitive, or cyber threat intelligence, for this case study, a private sector intelligence team is defined as one that is focused on global issues such as crime, terrorism, or economic or political stability and seeks to provide strategic analytic insights to business leaders to aid in decision making. Strategically focused geopolitical teams are the focus of this study because they are in a position to effectively address uncertainty in shifting global markets, allowing for better strategic decision making in investment and business operations. The purpose and intent of these teams also align most closely with those described by Kilmann and Ghymn (1976) and Gill et al., (2009).

Systems theory: According to systems theory, a system is made up of multiple interrelated, interdependent component parts (Bertalanffy, 1972). A system has a boundary that separates it from its environment, thereby limiting external influences (Luhmann, 2006). Despite these limitations, open systems theorists argue that because every system is embedded in other, larger systems, there is a dynamic, ongoing, and ever-changing process of self-organization, growth, and adaptation wherein the system exchanges information with and is influenced by its environment (Cummings & Worley, 2016; Montuori, 2011).

Interdependence: Interdependence is a central concept within systems theory and refers to an interrelationship between two or more autonomous elements such that the elements are altered or changed as a result of their interaction with each other. The result of this interaction thus results in a new, emergent organization wherein no part is directly dependent on any other, but rather all elements are shaped and formed by the organization as a whole. Interdependence relies on connectivity and indicates the potential for both elements to be changed by an interaction, whereas dependence is indicative of a unidirectional reliance of one element on the other (Balliet et al., 2017; Griffin, 2022).

VUCA: VUCA refers to volatility, uncertainty, complexity, and ambiguity (Bennis & Nanus, 1985). VUCA highlights a global context that is constantly changing, marked by instability and unpredictability. In a VUCA environment, events unfold rapidly, often in completely unexpected ways, resulting in challenges in determining cause and effect. Repercussions in a VUCA environment are often multi-layered and difficult to understand with layers that are intermingled and interrelated.

Conceptual Framework

The conceptual framework is a roadmap serves as a guide through the literature review. The concepts that will be discussed in Chapter 2 are focused on the components involved in developing and leveraging a private sector intelligence capability within an MNE. Using this framework, concepts influencing a team's structure, staff, skills, systems, shared values, strategy, and leadership styles were analyzed through a systems theory lens, focusing on their interrelated nature and on the team's interaction as a system with its external environment from an open systems perspective. Systems theory is focused on developing broadly applicable concepts and principles, as opposed to concepts and principles specific to one domain of knowledge (Bertalanffy, 1972). Systems theory is both a transdisciplinary field of study and a theoretical framework which encompasses many microlevel approaches to explain the behavior of complex, organized systems, regardless of domain (Whitchurch & Constantine, 2009). Because systems theory is a broad concept, the conceptual framework for this study applied the McKinsey 7S model (Waterman et al., 1980), in order to narrow the scope and define potential categories of application for systems theory. McKinsey 7S is a versatile systems theory model that allows for an analysis of the role of various elements within an organizational system on the performance of a team.

Given that open systems highlight the interplay between a system and its environment, the conceptual framework for this study identifies the company's broader organizational culture and the complex and challenging geopolitical context as the environment within which the team must operate. Within this context, the team's strategy, systems, and structure are established, and, when aligned, serve as a scaffolding for the team's internal dynamics, including its shared values.

Narrowing the scope further, leadership styles, including autonomy-supportive leadership (Deci & Ryan, 1985; Greiner, 2014) and cultivating an environment that encourages innovation (Hill et al., 2014), serve as a scaffolding within which staff and skills development can occur, aligned with the team's overarching shared values. This staff and skills development may include leadership and professional development. There is limited literature on the utility of intelligence in the private sector, and even less literature specific to the professional development of private sector intelligence professionals. However, because the work of intelligence in the private sector is done by individuals, generally within a team structure, there was a specific focus on identifying effective leadership styles, processes and procedures, structures, and skills development that encourage both teamwork and professional and leadership development on similarly situated teams. The focus on professional development was grounded in self-determination theory (Deci & Ryan, 1985), which is a motivational theory. Deci and Ryan (1985) argue that according to self-determination theory, autonomy is a psychological need and thus autonomy-supportive leadership behaviors are critical to both human and professional development.

Theoretical Framework

The theoretical framework is the roadmap that guides the research design, detailed in Chapter 3. The researcher has chosen a social constructivist worldview for this study (Berger & Luckmann, 1967; Crotty, 1998; Van Manen, 2014). This case study employed a qualitative, multi-method approach, including interviews, a questionnaire, and document analysis (Husserl, 2013; Polkinghorne, 1989). The social constructivist worldview aligns with this study's effort to make sense of the private sector context in which geopolitical intelligence analysts work, based on their historical and social perspectives. In this way, the generation of meaning is social, based

on interrelationships between people, and between people and the context in which they operate (Crotty, 1998). According to the social constructivist paradigm, individuals seek to understand the context in which they live and work through subjective meanings that are formed through interactions with others (Mertens, 2010). The social constructivist paradigm also aligns well with a systems theory approach, because systems theory seeks to construct concepts and principles that apply more broadly, similar to the construction of meaning through a social constructivist paradigm.

Research Questions

The research question guiding this inquiry was: How, if at all, does systems theory explain how geopolitically-focused intelligence teams operate in the private sector? This dissertation will demonstrate that open systems theory is a useful theory for explaining how geopolitically-focused intelligence teams operate in the private sector. Seven subquestions explored the perceptions of former team members through a systems theory lens and were considered throughout the collection and analysis of interview data.

- SQ1: What knowledge, skills, and abilities might need to be present on this type of team?
- SQ2: What type of human and other resources might be required to adequately address the business requirements levied upon this type of team?
- SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?
- SQ4: What considerations could be taken into account when developing a private-sector intelligence team's structure?

- SQ5: What systems or processes could be put in place to best leverage a private-sector intelligence team?
- SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?
- SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?

This method of inquiry sought to bridge the academic-practitioner divide by allowing for a theory-based approach to a practical challenge with implications for theory-development and knowledge-building, as well as for practitioners in the field.

Limitations

This was an exploratory study using a qualitative case study methodology. Data for the study were gathered via video interviews as a socially-distanced alternative to face-to-face interviews.

The researcher's professional and personal relationships and experiences within the private sector intelligence space and engagement with this particular team may have posed a potential for bias in data collection and in data interpretation. This limitation was addressed and mitigated by employing the methodological guidelines laid out in chapter three.

Although the researcher reached out to all former members of the team for the interviews, there were three former members of the team that were unable to be reached, as they did not respond to the initial invitation to participate, nor did they respond to two follow-up attempts to contact them. As such, the data are likely reflective of a sample of convenience (as opposed to a random sample), leading to results that may not be indicative of the views of the entire population; however, because these individuals' contemporaries were interviewed, including

those with similar job responsibilities, it is likely that at least some of their perceptions were represented. This limitation was also addressed and mitigated by employing the specific methodological guidelines laid out in chapter three. The data sources available to the researcher also served as a limitation for this study. Additional insights may also have been gleaned from other data sources such as feedback from customers, other employees, or shareholders, but this data was not available for review and evaluation.

Given that the study took place amidst a global pandemic, video interviews were used as an alternative to face-to-face interviews to adhere to recommended social distancing measures. This may have limited the ability to build rapport and/or connect with interview subjects.

Similarly, the questionnaire was distributed during the pandemic, at a time when many in the field were experiencing an increased workload, as their companies sought to address COVID-19-related challenges. This context may have altered respondents' perceptions of job requirements and priorities. This increased workload may also have constrained the pool of respondents, with some potential respondents unable to find the time to address the questionnaire.

Because both interview participants and questionnaire respondents were private-sector at-will employees working amidst a global pandemic, unexpected changes in the workforce (layoffs, furloughs, etc.), changes in leadership, or changes in role or job requirements may have eliminated or changed the nature of the data collected or the perspectives of those involved in the study.

Both interview participants and questionnaire respondents were asked to reflect on their personal memories and perceptions, and recollections of lived experiences tend to be inherently subjective (Muscari, 1985).

Participants in the interview portion of this study were all former employees of the same company but were current employees of a number of different companies in a variety of industries, and as such their current roles and integration into the private sector more broadly may have provided a new lens through which they viewed their previous experiences. Although the company studied for interview purposes has a global footprint, those selected for the study were all employed by the U.S.-based corporate headquarters, and thus may have been western-oriented, which may have constrained the generalizability of the findings. However, the questionnaire was deployed to a broader audience, which was composed of both U.S.-based and international personnel.

Given that this was a qualitative study, generalizability of results cannot be guaranteed. According to Maxwell (2009), generalizability in qualitative studies is often based on a study's applicability to other cases. As such, the interview participants' and questionnaire respondents' assessments of the generalizability of the data, the similarity of both constraints and dynamics with other situations, external corroboration from other studies, and the presumed universality of the applicability were critical to lending credibility to the generalizations made from this case study (Hammersley, 1992; Maxwell, 2009; Weiss, 1994). Generalizability was also assisted by the use of a systems theory approach, which seeks to derive theorems which can be applied universally, across domains of application (Whitchurch & Constantine, 2009).

Delimitations

For the purposes of this study, the researcher opted to focus solely on strategically-focused geopolitical intelligence teams in U.S.-based private sector MNEs, though a number of different types of intelligence teams exist in the private sector, including market intelligence or competitive intelligence teams.

The population sample selected for the study also limited the scope of the study (Becker, 1991; Maxwell, 2009; Ragin, 1987), as the practitioners selected for interviews were former members of one specific team within one large MNE. By selecting only former members, this limited the recency of participants' recollections and likely expanded the breadth of their experiences within the private sector intelligence field. It also situated a portion of the study within one organization, while leveraging the questionnaire to understand the applicability of interview participants' perceptions across the broader community. A different population sample—for example, one directed at executives who have benefitted from these types of teams or one targeted towards geopolitically-focused public sector teams—would likely have provided a different perspective and yielded different data.

The timing of the interviews also provided a delimitation for this study. As the study took place during a global pandemic, the perspectives of the interviewees likely shifted from prepandemic considerations. Further, as the pandemic has spiked or waned in many parts of the world, these perspectives may also be different from other periods of time during the pandemic.

The selection of the specific problem, purpose statement, applicable research paradigm, research questions, and use of a qualitative case study also served as delimitations for this study. By selecting a specific perspective from which the study was approached and developing a specific set of research questions that employed a systems theory lens, the scope of the study was necessarily narrowed.

Assumptions

Assumptions are made by any researcher conducting a study. These assumptions often include deeply ingrained views about which problems should to be studied, which research questions should be asked, or how data should be gathered. Researchers develop the beliefs that

undergird these assumptions throughout their educational training, and as such, these assumptions must be recognized and identified to understand their fundamental impact on the research (Creswell & Poth, 2018). The assumptions for this study included:

- Interview subjects and questionnaire respondents provided thoughtful, considered, and honest responses regarding their perceptions and experiences on a private sector intelligence team.
- The researcher did not influence the participants or questionnaire respondents in their responses.
- There existed a reasonable amount of commonality amongst participants and respondents in the study due to the shared geopolitical context of their experiences as well as their shared experiences within the private sector.
- The experiences of the participants and respondents were relevant to establishing a framework for considerations related to building and leveraging intelligence teams in the private sector that add to the scholarly body of knowledge regarding strategically-focused geopolitical intelligence teams within the private sector. No current body of literature addressing an approach to developing this specific type of team within the private sector was found.
- The experiences of the participants and respondents were relevant to establishing a framework for considerations related to building and leveraging intelligence teams in the private sector that will ultimately add to the scholarly body of knowledge regarding leadership and professional development within these teams.
- The experiences of the participants and respondents were relevant to establishing a framework for considerations related to building and leveraging intelligence teams in

the private sector that will ultimately add to the scholarly body of knowledge regarding these teams' organizational development and organizational culture.

- Systems theory could serve as relevant lens through which to understand and explain the operations of geopolitically-focused private sector intelligence teams.

Positionality

Inherent in qualitative inquiry is some degree of researcher bias, which necessitates self-reflection in order to conduct ethical and balanced research (Sultana, 2007). The researcher's position encompasses not only their relationship to the research methods and subjects but also their personal worldview (Foote & Gau Bartell, 2011; Savin-Baden & Major, 2013; Sultana, 2007). The following elements of positionality may be noted:

1. The author of this study has served in the U.S. intelligence community, serving in several different operational intelligence roles.
2. The researcher subsequently moved to work in the private sector and was actively involved in scoping, building, and leveraging the private sector intelligence team at a major U.S. Fortune 500 company.
3. The researcher actively involved in a number of private sector networking and information-sharing organizations focused on geopolitical security and intelligence.
4. The researcher has previously worked in a professional setting with some of the research study subjects and has developed professional working relationships with many of them. Additionally, while the documents reviewed were not labeled as confidential, the researcher's background, experience, and knowledge may have afforded them access to documents that might be considered confidential.

For the purposes of this study the researcher has suspended their biases as far as possible.

Organization of the Study

The dissertation study is organized as follows.

The first chapter introduced the study, providing the background for the study and establishing the problem statement, purpose statement, significance of the study, key definitions, conceptual and theoretical frameworks, research questions, limitations, delimitations, assumptions, and researcher positionality. It also provided the overarching significance of the study.

The second chapter provides a review of literature and an analysis of the current state of the body of knowledge as it relates to private sector intelligence teams within multinational corporations. Topics in the literature review include the literature around team-building, professional development, and motivational theory, and what is known about cross-cultural leadership. This chapter also identifies gaps in the literature, underlining the significance of conducting this study. Finally, this chapter outlines the conceptual framework, which employs systems theory and in particular the McKinsey 7S framework.

The third chapter identifies and details the research methods employed in exploring this global case study. This includes an examination of the research purpose and questions, presentation of the research design (including its epistemology, research paradigm, and methodology), design validity and reliability, research setting and sample population, human subject considerations, and instrumentation. It will also detail the data collection, data management, and data analysis procedures for the study.

The fourth chapter is a presentation of the findings from the research study. Significant study findings are presented with no interpretation of the study results, though relevant figures, tables, graphs, and direct quotations from the interviews are included.

The fifth and final chapter is an analysis of the findings from the research study. This includes a comparison of interview themes, a thorough evaluation and interpretation of findings, a discussion of possible implications for future practice in the field, recommendations for further research, and first-person reflections on the study.

Chapter Summary

Chapter 1 provided an overview of the background for this global case study and laid out the conceptual and theoretical framework used as its foundation. This chapter situated this study in the private sector, providing a scope and definition for the term "intelligence" that helps to clarify the utility for private sector businesses. This chapter introduced the McKinsey 7S framework, as well as key concepts used as a basis for this case study. The chapter subsequently laid out the problem and purpose statements for this study, as well as the significance of the study, noting the value that MNEs bring to the global arena and the support that private sector intelligence teams can provide to business decision makers as they seek to strengthen their economic positions. This chapter also addressed the research questions, limitations, delimitations, and assumptions involved in crafting this study and characterized the author's positionality to address any potential biases in data collection and interpretation which may present challenges to ethical and balanced research. The conceptual framework laid out in this chapter will be expanded on in the following chapter, which will include a review of the literature that underpins this study. Chapter 2 will present the broader concepts associated with systems theory, and each element of the McKinsey 7S framework will be explored in greater depth.

Chapter 2: Literature Review

Chapter Overview

This chapter is a review of the literature in the field and begins by documenting what is known about the intent of geopolitical intelligence teams working for private sector MNEs and then synthesizes the literature on systems theory, focusing on the elements of a system. Sections for this chapter include: Context, Conceptual Framework, The VUCA World, Systems Theory, Strategy; Strategy, Systems, and Structure; Shared Values; Styles; Staff and Skills; Gaps and Inconsistencies in the Literature, and Chapter Summary.

Context

The purpose of this global case study was to explain, using a systems theory lens, the interdependence of the components involved in building and leveraging geopolitically-focused intelligence teams in U.S.-based private sector MNEs. The central research question guiding this inquiry was: How, if at all, does systems theory explain how geopolitically-focused intelligence teams operate in the private sector. Seven subquestions explored the experiences of former team members through a systems theory lens and were employed during the collection and analysis of interview data.

- SQ1: What knowledge, skills, and abilities might need to be present on this type of team?
- SQ2: What type of human and other resources might be required to adequately address the business requirements levied upon this type of team?
- SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?

- SQ4: What considerations could be taken into account when developing a private-sector intelligence team's structure?
- SQ5: What systems or processes could be put in place to best leverage a private-sector intelligence team?
- SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?
- SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?

Conceptual Framework

The conceptual framework for this study leveraged the McKinsey 7S model (Waterman et al., 1980) in order to analyze the role of various elements within an organizational system on the performance of a geopolitically-focused private sector intelligence team. Although there are a number of different systems theory models, McKinsey 7S was chosen because it is focused primarily on team or organizational environments, particularly in the business context. These intelligence teams make up a transnational community of professionals, and the field is designed to provide insights regarding security risk mitigation and to facilitate business decision making (Robson, 2022). As shown in Figure 1, the conceptual framework for this study identified the company's broader organizational culture and the complex and challenging geopolitical context as the environment within which the team must operate. As identified by Montuori (2011) and Cummings and Worley (2016), open systems theory posits that every system is embedded in other, larger systems, meaning that there is a dynamic, ongoing, and ever-changing process of self-organization, growth, and adaptation wherein the system exchanges information with—and is influenced by—its environment.

Within this context, the team's strategy, systems, and structure are established, and when aligned, serve as a framework for the team's internal dynamics, including its shared values. These shared values are a critical part of the team's internal organizational culture and are representative of a shared perception of how the organization should be. These shared values include considerations such as rigidity versus flexibility, internal versus external focus, teamwork versus individualism, and standardization versus innovation.

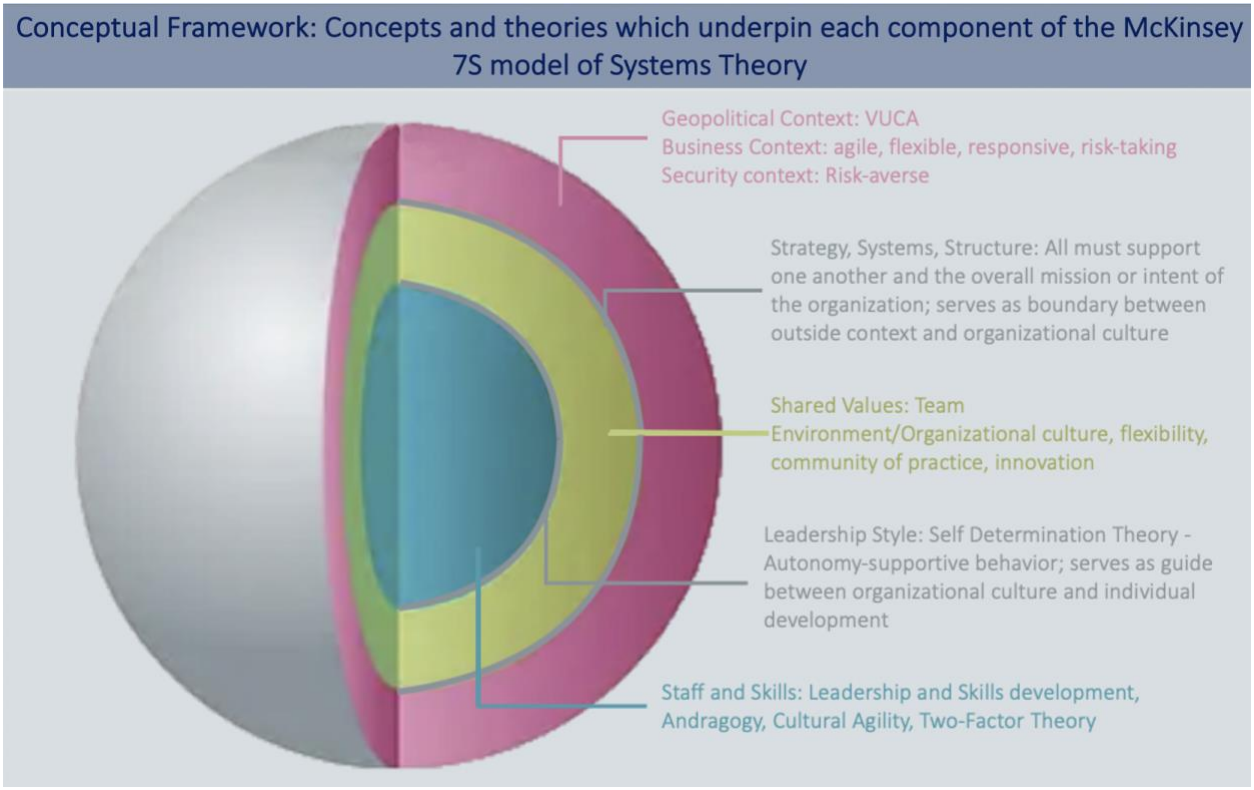
Leadership styles, including autonomy-supportive, participative, transformational, and cross-culturally-focused leadership, serve as a scaffolding within which staffing requirements can be identified and skills development can occur, as aligned with the team's overarching strategy and shared values. Literature on the value, utility, and scope of intelligence in the private sector is limited, and even less literature exists that is specific to the professional development of private sector intelligence professionals. However, the work of intelligence in the private sector is generally done within a team setting, while seeking to address challenging and unique problems. Therefore, this literature review has those leadership styles, processes and procedures, structures, and skills development opportunities that encourage teamwork and professional and leadership development on similarly situated teams. This includes motivational theories such as self-determination theory (Deci & Ryan, 1985) and two-factor theory (Herzberg et al., 1959). According to self-determination theory, autonomy is a psychological need and thus autonomy-supportive leadership behaviors are critical to both human and professional development. According to two-factor theory (Herzberg et al., 1959), the development of competence through job enrichment increases motivation and job satisfaction in the work environment.

Although the initial McKinsey 7S framework has been depicted a flat or two-dimensional spiderweb-like graphic to depict the interdependent nature of these component parts (Waterman,

et al., 1980), the fact that these are not flat two-dimensional relationships supports the conceptualization of the interrelated nature of these elements within a sphere. While each individual element relates to another on a theoretical continuum, each factor is acting on several other factors contemporaneously, creating three-or even four-dimensional relationships where an individual element is acting on others and being acted upon by multiple vectors from multiple directions at any given time.

Figure 1

Conceptual Framework



The VUCA World

Global businesses worldwide have been grappling for many years with how to maximize the opportunities that an increasingly globalized business context affords. These opportunities, however, come amidst increased complexity, uncertainty, and high potential for failure (House et

al., 2014). The rapid pace of globalization has created many growth opportunities in multiple business sectors. This globalization has also required companies to work across geographic and cultural boundaries in addition to adding complexity to the relationships between organizational and business sectors (Foster, 2020; Hackman & Johnson, 2013; Robertson & Lechner, 1985). In 1987, the U.S. military began using the term "VUCA"—referring to volatility, uncertainty, complexity, and ambiguity—to describe this challenging environment (Stiehm, 2002). This VUCA state has required multinational enterprises to be increasingly flexible. This flexibility often entails moving away from a myopic focus on classic cost minimization/profit maximization traditions into implementing a broader focus that includes capability development, which is increasingly likely to take place in regions where understanding fast-moving geopolitical developments is paramount (Petricevic & Teece, 2019; Bennett & Lemoine, 2014). For businesses to achieve continued success in uncertain times and in a fast-paced and competitive environment, they will need to rely heavily on staying ahead of these geostrategic developments. Furthermore, for global businesses, this VUCA context is both permanent, due to the rapidly changing geopolitical environment, and situational, depending on the current plans and intentions of a given company and the needs of its decision makers.

According to Abidi and Joshi (2015), resilient leadership allows leaders to anticipate change as a result of VUCA. Moreover, leaders must not only be trained on core competencies, they must also be able to identify factors that will inhibit their resilience and adaptability. Wolf (2007) noted that VUCA management and leadership relies on the values embedded within the enterprise. Similarly, Johansen (2007) argued that leadership in VUCA environments requires an understanding of the technical, social, political, market, and economic realities of the environment in which business operations take place. According to Robson (2018), geopolitical

intelligence professionals are positioned to identify the markers of regional and global change and to inform strategic decisions amidst uncertainty. From civil unrest to crime to terrorism to economic shifts, geopolitically-focused analysts are attuned to the nuanced dynamics within their areas of expertise and are able to advise leaders of trends that may significantly alter the value proposition of a decision (Robson, 2018).

Uncertainty Avoidance

As suggested by Gill et al. (2009), intelligence should serve to reduce a decision maker's uncertainty, allowing them to make reasoned, insightful, and context-specific decisions. There has been considerable research in the field of uncertainty avoidance, both in terms of national culture and in business and economic decision making. Economist John Maynard Keynes (1931) argued that judgement about risk is possible when seeking a basis for action and thus, much of Keynesian economic theory was based on reducing uncertainty through altering the economic environment and by implementing institutional change. From an economic perspective, a business investment in a geopolitical intelligence function is much like the Keynesian implementation in institutional change, seeking to establish a framework that allows for greater certainty for business decision making. Conversely, this does not negate the Knightian uncertainty principle, wherein there is a fundamental degree of ignorance and a limit to knowledge (Knight, 1921). Efforts to quantify the impact and effects of this imperfect knowledge have led to research in the related but nuanced fields of ambiguity aversion and risk aversion (Ellsberg, 2016). Thus, given the Knightian uncertainty principle—that there is an essential unpredictability of future events (Knight, 1921)—if a business seeks to capitalize on the expertise of an intelligence team, which primarily exists to make sense out of an increasingly VUCA environment, it is critical that there be an understanding of the overall scope and

limitations of such teams. This aligns with a nuance asserted by Friedman and Zeckhauser (2012) that the primary goal of intelligence is not to eliminate uncertainty but to assess it. In this regard, assessing uncertainty allows for an understanding of the likelihood and confidence of the intelligence being provided, rather than only sharing what is positively known.

Systems Theory

The scope and limitations of a private-sector geopolitically-focused strategic intelligence team are not solely influenced by the VUCA context, but also by the organizational culture within which it exists. In addition, other relevant factors include the organization's structure, strategies, processes (systems), the shared values within the organization, its embedded leadership styles, and the staff and skills it employs. Although originally based in the scientific field, systems theorists define a system as an entity made up of interrelated, interdependent parts and posit that because a system's multiple component parts are interconnected, modifications to one part will have an impact on other component parts (Bertalanffy, 1972). To quote the holistic and Aristotelian teleological notion, "The whole is more than the sum of its parts" (Aristotle, ca. 350 B.C.E./1924). German sociologist and theorist Niklas Luhmann (2006) took systems theory one step further, arguing that a system has a boundary that separates it from its environment, thereby limiting external influences. According to Wilkinson (2011), however, systems theory serves as a conceptual framework that is underpinned by the idea that individual component parts of the system are best understood in the context of their relationships with each other and with other systems, rather than in isolation. Theoretically, in the case of a strategic intelligence team, this boundary may be defined by the strategy, structure, and systems that a team employs to operate effectively within a given context.

Within a corporate intelligence team, while the team may function as a system, there are external influences—such as organizational culture, geopolitical context, other related teams, and leadership concerns—that impact its operations from a strategic perspective. As such, an open systems perspective, which stresses the role and importance of context and environment, is better aligned with the operation of these teams than a closed systems approach (Montuori, 2011). Within the concept of an open systems approach, Montuori noted that every system is embedded in other, larger systems, and as such, there is a dynamic, ongoing, and ever-changing process of self-organization, growth, and adaptation. Cummings and Worley (2016) described open systems as organizations or groups that exchange information and resources with their environments—environments being everything outside of the system that can influence it. As a result of these external forces, organizations—in this case, geopolitical intelligence teams embedded within MNEs—do not fully control of their own behavior. Beven (2006) argued that the degree to which a system adapts will depend on how well the system is engaged with its environment. The objective of a systems approach is to use one system's dynamics, constraints, and conditions to develop principles that can be applied more broadly to other systems, with the goal of achieving optimized equifinality (Bertalanffy, 1972; Beven, 2006). According to the concept of equifinality, firms may use substantially different competencies to establish similar competitive advantages (Cummings & Worley, 2016). As such, there is likely no one single path to building or leveraging a geopolitical intelligence function in an MNE, but rather a number of concepts that can be applied broadly to achieve an optimal result.

According to Luhmann (2006), all systems have a distinct identity that is reinforced through its communications and values. Without this distinct identity, the system ceases to exist. Aligned with this distinct identity and common values, Behrmann (1985) posited, in applying

systems theory to an organization's functioning, that an effective system can be established only through understanding the characteristics of human and organizational behaviors. As such, an integral part of the system is the interaction of the individuals and organizations within the system. In this regard, organizational theorists have suggested that the arrangement of an organization's human resources, so as to meet its objectives, has a significant impact on the behavior of individuals within the organization (Nahavandi et al., 2015). According to Nadler and Tushman (1997), the degree to which an organization's strategy, work processes, people (and their capabilities), structure, and culture are aligned will determine the organization's effectiveness.

Given the VUCA context that many of these teams operate within, the concept of homeostasis, which is a system's tendency to maintain its key characteristics and to be resilient in the face of external disruptions, is also critical. Kim and Rose (2014) addressed homeostasis in the context of family systems theory, highlighting that homeostasis is achieved based on an effort to return to predetermined setpoint. Kim and Rose also identified self-appraised antecedents, interdependence, the tendency toward stability, and feedback mechanisms, as relevant dynamics in family systems theory. These dynamics are also relevant to other types of interpersonal relationships, and thus to the operation of teams within an organizational context.

Feedback mechanisms include feedback loops, which are the process by which systems self-correct based on interaction with the external environment. This concept has been studied in great depth in the mathematics (dynamical systems), engineering, and biology fields (Panadero & Lipnevich, 2022), but it is also present in the intelligence field, particularly in the public sector, as intelligence producers leverage feedback from consumers to refine their products and ensure relevance.

The McKinsey 7S Model

The McKinsey 7S model (Waterman et al., 1980) is a versatile systems theory model that allows for an analysis of the role of various elements within an organizational system on the performance of an individual team. While numerous other systems theory models exist–many of which are aimed at explaining biological, familial, or mathematical systems–this model can be applied to analyze an intelligence team's organizational structure and the processes and procedures (systems) it employs—as well as how these elements influence the efficacy of analysts at accomplishing their mission. This model also allows for the identification of the necessary skills a leader should seek to develop in an organization's intelligence professionals and what shared values they want to cultivate on their team to improve organizational culture and to increase intrinsic motivation. It also allows for an analysis of the impact of system dynamics on the staff, the role of leadership styles in the development of an effective intelligence cadre, and what strategies could be employed to facilitate the team's accomplishment of the stated organizational goals.

Theorists and organizational consultants have noted that the seven elements within the McKinsey 7S model can be divided into hard elements and softer or more intangible elements which are influenced by corporate culture. The hard elements have been identified as structure, strategy, and systems, while the softer elements have been identified as shared values, skills, style, and staff (Ravanfar, 2015; Ülgen & Mirze, 2004). According to Edmondson (1999), studies of work teams in a variety of organizational settings have shown that structural features, including well-designed taskings, effective team composition, and adequate resources enable team functioning (Hackman, 1987). Some researchers have even argued that structure and design—including resources, physical environment, and pay systems—are the most important

variables for work performance (Campion et al., 1993; Cohen & Ledford, 1994; Goodman et al., 1988) and have argued against focusing on interpersonal factors, as organization and team structures explain the majority of variance in team effectiveness (Goodman et al., 1987).

Conversely, organizational learning researchers have emphasized the importance of cognitive and interpersonal factors in effective organizations (Argyris, 1993). Levitt and March (1988) argued that the failure of some organizations can be explained by a failure to adapt rationally due to cognitive biases that favor existing routines over alternatives. The differing perspectives on the hard and soft elements of McKinsey 7S and the literature in both camps that seeks to explain organizational effectiveness lends value to the holistic approach employed through the McKinsey 7S model, which allows all of these elements to serve as a framework for the various components that can go into building a geostrategic intelligence team within an MNE.

Strategy, Systems, and Structure

In viewing private sector, geopolitically-focused intelligence teams through a systems theory lens, a number of component parts can be evaluated to understand how these teams operate and are leveraged. Within the team's external context, its strategy, systems, and structure can be viewed as a framework for its internal dynamics.

Strategy

An organization's strategy describes how an objective will be achieved (Hatch & Schultz, 2002). To operate effectively in either normal or chaotic times, regular strategy planning sessions are critical to determine how to obtain and allocate resources to mitigate risks (Mintzberg et al., 1996). Beyond resource request and allocation, strategy must also be applied to address organizational growth and team development. Much of the responsibility for these strategies is

often delegated to mid-level managers and first-tier executives (Widhalm & Lunardi, 2018). As the overall objective of an intelligence team is often loosely defined in terms of serving the customer, the implementation of these strategies is largely left to individual interpretation, which increases the potential for conflict. As such, leaders must be clear not only on the overarching strategy, but also on the implementation of such strategies. For example, if an organization states that it values continuing education and ongoing training as means of developing its workforce, its strategy must be aligned such that it allows the organization to follow through in identifying applicable educational opportunities and relevant trainings, allocating funding for these opportunities, and then setting aside and prioritizing time for employees to participate. Further, to truly realize the value of these opportunities, employees should have the opportunity to discuss what they learned and to implement these new skills or ideas (Jehanzeb & Bashir, 2013).

A clearly-defined strategy and subsequent implementation plan are both necessary to ensure that intelligence teams can continue to be innovative, see the big picture, and achieve goals (Kouzes & Posner, 2011). While this is challenging in the midst of ambiguity, leaders will also find that clearly-defined long-term objectives will help teams respond to competitive pressure regarding resource constraints and know when and where to reallocate resources over time when business needs dictate. Further, a well-defined strategy connects long-term objectives to daily tasks and supports and encourages a learning organization (Senge, 1990). As such, it also encourages the development of competence and increases motivation factors, while limiting the impact of those factors that are not central to the core work responsibilities (referred to as *hygiene factors*) on the work environment (Herzberg et al., 1959).

According to Weissenberger-Eibl et al. (2019), strategy must also be refined over time by aligning both internal and external perspectives, allowing for quick reactions to environmental changes. Further, strategy implementation affects the entire organization, and thus, must be applied organization-wide, meaning that organizational structures and processes must be aligned to support the strategy (Sterling, 2003). Porter (1998) argued that formulation of a competitive strategy consists of four key elements: (a) company strengths and weaknesses, (b) the personal or individual values of those implementing the strategy, (c) the industry opportunities and threats, and (d) the broader societal expectations. Although Porter's description of strategy was applied more broadly to a company, developing strategy in the context of a private-sector geopolitical intelligence team would thus refer to the strengths and weaknesses of the team; the individual and shared values of those on the team; the opportunities and threats in the broader context in which the team exists, both geopolitical and organizational; and the broader expectations of the team and its capabilities, likely from executives and decision makers.

A 2019 study of 9,000 public and private organizations revealed that strategic planning had a positive impact on organizational performance (George et al., 2019). In particular, strategic planning is beneficial in enhancing organizational effectiveness, though planning alone is not adequate. In order for strategic planning to achieve its goals, it must be based on an analysis of both the internal and external operating environments and consider a comprehensive array of options before providing recommendations. It must also carefully consider the intelligence needs of its stakeholders (George et al., 2019).

Systems

As suggested by Bertalanffy (1972), the interconnected nature of the multiple component parts of any organization or system make systems heavily reliant on established work processes that largely define the interactions between elements of the system. Systems characterize how work is done; they define and can be used to improve the operations of a business (*Enduring Ideas,* 2018). As most corporate intelligence functions fall within a security context, there is often a heavy emphasis on hierarchical structure and a desire to codify norms to avoid ambiguity (Hayes et al., 2013). In this context, the coordination processes for the creation of intelligence products must be clear and specific, and roles and responsibilities must be clearly defined. Thus, many organizations seek as much standardization as possible through standard operating procedures and best practices that allow for the codification of expectations and a cohesive approach (Torres-Baches, 2018). However, because intelligence teams vary in size, skill, function, and consumer base, standard operating procedures (SOP) for intelligence teams should be broad enough to serve as mission statements and best practice guides that facilitate analytic work, rather than strictly controlling or regulating it (Torres-Baches, 2018). This must be balanced with the requirement for these teams to operate in a cross-functional environment. Galbraith (1998) argued that the amount of coordination required within a structure is a function of the amount of uncertainty in the environment, the differentiation between the subunits, and the degree to which the subunits are interdependent. As each of these elements increases, more sophisticated systems for coordination are required.

Structure

According to Hill et al. (2014), many leaders like structure because it provides the comfort of a perceived level of control.

> Left to their natural tendencies, organizations, even successful ones, ironically, will proliferate the number of control structures they use - specific goals, detailed plans, progress reports, hierarchy, processes, policies, and the like - even in the search for innovation. They neither understand nor feel comfortable with the improvisation and autonomy that innovation requires. (Hill et al., 2014, p. 36)

However, a geopolitical intelligence analyst adds value to business operations through their ability to use mental agility to view an issue from different perspectives while recognizing cultural nuances. As such, intelligence professionals must have a high level of flexibility, including the latitude to take a unique or innovative approach when a consumer's needs dictate that one be employed. An intelligence professional's primary goal is to answer a decision maker's question as it is relevant to that particular company or segment at a given time (Widhalm & Lunardi, 2018). Hill et al. (2014) noted that constraints and boundaries will always live in tension with the freedom to explore ideas, though preconceived models and expectations can serve as an unnecessary limit to identification of creative solutions. Rigid processes or rules, while useful in facilitating efficiency, can also limit or predetermine outcomes (Hill et al., 2014).

While theoretically, standardization allows for common leadership approaches and expectations, which are supported by the system, once established, the implication is that these SOPs should not diminish the work of the analysts by eliminating the necessary element of flexibility. This flexibility, of course, creates its own challenges in managing, measuring, and communicating progress towards business objectives because impact metrics can be difficult to codify. While it is possible to articulate the number of intelligence products created for consumers, defining what risks were mitigated against or measuring the contribution of a piece

of intelligence in light of a revenue stream is far more challenging (Prestwood, 2018). However, according to Paul Kolbe, the Director of the Intelligence Project at Harvard University's Belfer Center for Science and International Affairs, in today's fast-paced business environment, intelligence professionals are often asked to complete tasks that are outside of their job description (Long & Mallard, 2021). Without this necessary flexibility, intelligence teams lack the ability to adapt and innovate to tackle new challenges (Prestwood, 2018).

According to Weber's (1947) bureaucratic approach, organizations rely on structure, specialization, predictability and stability, rationality, and democracy to achieve their objectives. Fayol (1949) highlighted the importance of unity of direction and command, centralization, and organization as key principles for effective management. The systems approach, however, suggests that rather than the structure defining or dictating the organization, it should support the systems and link the organization's processes to its goals (Senge, 1990). To address structural issues, Senge (1990) further noted an organization's design must match its desired outcomes, meaning that the structure should support the effective work of intelligence professionals across the corporation and within the corporation's subunits or regional units. An implication of this is that the structure should therefore allow intelligence professionals the latitude to liaise directly with leaders who require analysis to make informed decisions. This allows for the most accurate understanding of decision-maker needs and eliminates structural challenges to this communication (Widhalm & Lunardi, 2018). Furthermore, Senge (1990) articulated that when there is a mismatch, the organization must quickly recognize and correct the error. Rather than allowing structure to define the function and role of an intelligence team, its structure should support the overall business strategy in accomplishing the mission and intent of the team.

MNEs often operate in a matrixed structure, resulting in people from different functional areas within the organization facing the challenge of effectively working together and thus spending "considerable time and resources coordinating and integrating their activities and training people to work in teams" (Nahavandi, et al., 2015, p. 459). As intelligence analysts are often brought in to inform on cross-functional issues, many of the consumers of their work are not in their direct leadership chain, making it increasingly difficult for leaders to truly gauge the value of individual contributors' work (Gardner & Ibarra, 2017). Given that intelligence teams seek to stay at the forefront of ongoing changes, their work tends to be innovative in nature, layering on new perspectives to address the evolving geopolitical landscape (Widhalm & Lunardi, 2018). According to Hill et al. (2014), leaders of innovative organizations and groups must view structure as a tool to facilitate collaboration and discovery-driven learning. As such, structure must be used sparingly and in a targeted manner. Thus, leaders must be cognizant of the risk of team or organizational structure undermining the intelligence team's capabilities. Flat organizational structures tend to allow this type of agility because they have minimal to no middle management, thus empowering individual contributors with greater responsibility. A flat structure also allows organizations to remain flexible and adaptive. In these types of organizations, employees are typically viewed as controlling their own work. (Thoumrungroje & Vithessonthi, 2011). Studies have also shown that flat structures tend to increase organizational productivity, decrease operating costs, speed decision-making, and minimize communication barriers (Rishipal, 2014). Rishipal further notes that employees in organizations with flatter structures tend to be more motivated because they may perceive themselves as having greater influence on the company, though they may also become frustrated by limited opportunities for advancement.

Structure, which can be divided by function, product, service, customer, or a combination of factors, is effectively the basic organizational mode for dividing the work of an overall organization to assign tasks to groups or individuals (Cummings & Worley, 2016). Structures are often used to coordinate work across subunits using the managerial hierarchy or a variety of systems, plans, task forces, or matrixed relationships (Lawrence & Lorsch, 1967). By building a foundation that can withstand chaos and confusion, and infusing it with enough flexibility to appropriately pivot as business needs change, these teams will be able to thrive well into the future and have the potential to inform more productive, and potentially more profitable, business decisions.

Shared Values

Within the context of a team's strategy, systems, and structure, which serve as a framework for the team's internal dynamics, a team's shared values are a critical part of its organizational culture. Schein (2004) defined organizational culture as "the set of values, norms, and beliefs shared by members of an organization" (p. 111). Nahavandi et al. (2015) described values as "ideas about the way in which the organization ought to be" (p. 479). Nahavandi et al. argued that if an organization's values are fully accepted by its members, individual members' behaviors should reflect those values. Values, therefore, are a crucial element in establishing a healthy organizational culture. Organizational values are also oftentimes what attract employees to specific employers, and they often serve as the core social contract between the organization and its employees (Nahavandi et al., 2015). Further, these values can also serve as the reason employees stay during difficult times, when it might seem easier to leave for greener pastures.

Hofstede et al. (2010) argued that values are the core elements of culture, whereas other aspects of culture, such as practices, are the outer layers. According to Jehn et al. (1993), value congruence, defined as the degree to which all members of a group agree on values, decreases both relationship and task-focused conflict. Further, specific values also influence performance. As intelligence teams often must work in a cross-functional nature, it is important for individual teams within a company to share in the broader company-established values. When values differ, perceptions of outcomes also often differ, potentially leading to noncollaborative behavior and interorganizational conflict (Findlay-Brooks et al., 2007; Macedo & Camarinha-Matos, 2013; Stott, 2007).

According to Cummings and Worley (2016), core values typically include three to five basic principles that represent the organization and its mission. Core values are intrinsically meaningful principles that have guided and will continue to guide the organization over time; they are not espoused values but rather the values-in-use that actually demonstrate what is important within the organization. Core values are not determined or designed; they are discovered and described through a process of inquiry. These core values are not only the beliefs that people hold about what is important within the organization, but also embedded within the work that people do, serving as the glue that holds the organization together (Bains, 2007; Schein, 1992). Oftentimes, organizations tout their values as something they are not; an example of this might be ascribing teamwork as a core value when cultural norms and organizational practices promote individuality. When values are integrated within the organization, they also provide guidelines for the strategic choices that will align with the nature of an organization (Hatch & Schultz, 2002).

There are several shared values that may lead to an intelligence team functioning effectively, including but not limited to innovation, psychological safety, group learning, growth mindset, flexibility, a results orientation, participation, teamwork, consensus, and collaboration (Argote et al., 1999; Delizonna, 2017; Durugbo, 2014; Edmondson, 1999; Hill et al., 2014; Wenger et al., 2009).

Innovation

As geopolitical intelligence requires mental agility to respond to an ever-changing geopolitical landscape, in many ways it mirrors the innovative processes seen in creative and entrepreneurial endeavors. According to Hill et al. (2014):

> If a problem calls for a truly original response, no one can know in advance what that response should be. By definition, then, leading innovation cannot be about creating and selling a vision to people who are somehow inspired to execute that vision...Instead of trying to come up with a vision and make innovation happen themselves, a leader of innovation creates a place - a context, an environment - where people are willing and able to do the hard work that innovative problem solving requires. (pp. 2-3)

The job of leaders who seek innovation is to structure an organization where the environment is one in which all employees are free to share their individual flashes of insight, which the leader can then leverage into a single work of innovation. It is through collaboration, the interplay of ideas through "interactions of people with diverse expertise, experience, and points of view, that such innovation is achieved" (Hill et al., 2014, p. 17).

Psychological Safety

As analysis can change as new information is received, there must also be an environment of flexibility and psychological safety that allows for reasoned assertions. According to Delizonna (2017), high performing teams operate in an environment in which employees do not fear punishment for making a mistake. Psychological safety allows for "moderate risk taking, speaking your mind, creativity, and sticking your neck out" (Delizonna, 2017, summary para) without fear of repercussions. This environment yields increased levels of engagement, increased motivation to tackle challenging problems, more learning and development opportunities, and better performance. According to Edmondson (1999), psychological safety is a "shared belief held by members of a team that the team is safe for interpersonal risk taking" (p. 350). This environment is also critical to learning, particularly in changing and uncertain organizational environments (Argote et al., 1999). Although there is limited literature on group learning, particularly on groups as information processing systems, Edmondson (2020, as cited in Boyatzis et al., 2020) addressed psychological safety in the context of an uncertain environment, noting that "when psychological safety is present, people are able to speak up with work-relevant content" (p. 2). Furthermore, this psychological safety amidst uncertainty can build cohesion due to a shared experience, allowing people to be more open. In this context, psychological safety can serve as a "potential driver of collaboration and innovation, further contributing to an open environment for producing and shared ideas that under normal conditions may have remained unshared" (Boyatzis et al., 2020, p. 2). As such, a learning organization should be supportive of both psychological safety and innovation.

Communities of Practice

Learning together can help unite groups by giving people new ways to discover what they have in common (Wenger et al., 2009). Many geopolitical intelligence teams are divided by geographic region, though given a shared focus on analysis, similarities in the work, and the common purpose to develop the most accurate and relevant intelligence for use by decision makers, there is logic in a group of analysts learning together how best to hone their craft. These similarities lend themselves to the creation of a community of practice. According to Wenger et al. (2009), the fundamental dimensions of a community of practice include domain, practice, and community. Sustaining a process of learning together over time "provides an identity for the community – a set of issues, challenges, and passions through which members recognize each other as learning partners" (Wenger et al., 2009, p. 407).

Further, through working in a community of practice, intelligence professionals are able to learn together how to use and implement the abstract information they obtain. Such a community also allows professionals to learn both from and with each other, sharing information and best practices, identifying new or relevant resources, and better understanding possible trends and their potential impact on the company (Wenger et al., 2009). Effective group learning depends on the quality of the relationships and the trust and mutual engagement that members develop with each other, a productive management of community boundaries, and the ability of some to take leadership and to play various roles in moving the inquiry forward (Wenger et al., 2009). Communities of practice align with "collaboration, discovery-driven learning, and integrative decision making" (Hill et al., 2014, p. 4), all of which are identified as key aspects of innovative processes. Moreover, if employees are given the latitude to collaborate in a manner

that encourages their own personal interests, this can lead to “communities of people collaborating and creating alternatives outside the boundaries of hierarchy” (Hill et al., 2014, p. 59).

Teamwork

Katzenbach and Smith (1993) described a team as a collection of individuals who blend their skills in pursuit of a unified goal and who hold themselves mutually responsible for performance outcomes. Durugbo (2014) characterized teams as socially influenced collaborative networks. Hakanen and Soudunsaari (2012) identified highly-functioning teams as having a defined and shared goal, a sense of responsibility and accountability, strong interdependent communications, and a commitment to a shared purpose and vision. In particular, Hakanen and Soudunsaari (2012) identified trust as a critical factor in the development of these high-performance teams. According to Locke and Latham (2002), goal-setting and role clarification are also critical to establishing high-performing teams because they enhance motivation, reduce conflict, and help establish the overall mission and objectives.

Significant research has been conducted on team development, including seminal works by Tuckman (1965), Poole (1981), Lewin (1947), Bales (1950), and Hare (1976), which have resulted in a wide array of theoretical models that seek to explain group dynamics, such as how groups deal with change and how they evolve over time. In particular, many of these models highlight group development through a variety of phases moving towards goal attainment or overall group cohesion (Gersick, 1991; McGrath, 1991; Tubbs, 2012; Wheelan, 1994). In all of these models, however, there tends to be an element of conflict that must be addressed before a team is able to function fully and effectively. A historic work by Tuckman (1965) synthesized a

number of these models into four primary stages of group development: forming, storming, norming, and performing. Through these stages, a group goes from low morale, a lack of involvement, and general confusion about goals and objectives (forming) to inconsistency and confrontational engagement (storming). It then moves to a phase of greater clarity of purpose and role confirmation (norming), and then arrives at a phase of creativity, openness, and concern for others (performing). A fifth phase, adjourning, was subsequently added to address the completion of a group task wherein the group disbands (Tuckman & Jenson, 1977).

More recently, Hackman (2003) proposed a multilevel perspective which suggests that a group is a highly complex system that may have elements not easily explained by its components (the individual). Hackman (2003) further articulated that viewing the big picture in relation to a group or a team was required to have a true understanding of group dynamics. HackmanHackman (1993)found that an airline crew's organizational context was a key determinant in its success. Hackman (1993) further found that five factors were critical elements in the crew's success: adequacy of material resources, clarity of performance objectives, recognition and reinforcement for excellent crew performance, availability of educational and technical assistance, and availability of informational resources. Based on Hackman's (2003) multilevel perspective, it is critical that group dynamics be reviewed from multiple viewpoints, including the individual, group, and organizational levels.

Similarly, Tubbs (2012) proposed a systems model that builds on Ludwig von Bertalanffy's (1972) systems theory concepts by adding a developmental process. As with many others in the field, Tubbs (2012) argued that group development is a process, consisting of orientation, conflict, consensus, and closure. These phases mirror many of the elements

described by Tuckman and Jenson (1977), though Tubbs (2012) also identified three subprocesses: inputs, outputs, and throughputs, which can result in a group changing. Tubbs (2012) also highlighted the importance of a group's ability to evolve based on the giving and receiving of feedback, which is a critical element to Tubbs' systems model.

One divergent perspective is chaos theory, according to which group dynamics are not a linear or sequential process. According to chaos theory, there is an inherent unpredictability in the group development process (McClure, 1998). McClure noted, however, that although groups go through phases of chaos, conflict, and uncertainty, systems typically have a point of equilibrium that they are seeking and given that groups generally have a desire to function effectively, this shared objective serves as a *strange attractor* that the team will move towards. Arising in the 1980s, chaos theory added a new dimension to systems theory, though the concept originated in the math and physics fields as dynamical systems theory in the research of Poincaré and Popp (2017) in the late 1800s to explain irregularities in fluid flows and the concept of the strange attractor. Systems theory had historically focused on systems in equilibrium, but studying systems not in equilibrium allowed for a greater emphasis on self-organization, emergence, and unpredictability, resulting in an increased focus on the interconnected nature of systems and the complexity such interconnectedness entails (Montuori, 2011). Montuori noted, however, that although emergence and self-organization are reflective of spontaneity, this should not be confused with chaos, as self-organization entails making meaning out of randomness or creating order out of chaos. In this sense, chaos theory can be seen as integrating elements perceived as disorder into a more all-encompassing organization.

Organizational Culture

Cameron and Quinn (2011) identified four types of cultures that generally exist in organizations that exhibit different types of values. In clan cultures, the organization values a friendly working environment and a high level of engagement. Clan cultures are characterized by personal relationships and morale and define success in the context of openness to the needs of the customer. These types of organizations attach significant value to teamwork, participation, and consensus, serving many of the higher order needs of Maslow's hierarchy of needs, such as belonging and esteem (Maslow, 1943). These cultures also align with the concepts espoused by self-determination theory (Deci & Ryan, 1985)—in particular, relatedness. This culture also aligns with McGregor's (1966) theory y. According to McGregor, a social psychologist, managers' perceptions of their employees could be plotted along a continuum from theory x to theory y. These managers' perceptions then affect their management styles. According to theory y, employees enjoy working, appreciate the ability to be involved in decision making, and are committed to their work (McGregor, 1966). Due to the requirement to be open to the needs of the customer, many intelligence teams aspire to operate as a clan culture.

Hierarchical cultures, on the other hand, tend to be highly formalized, relying heavily on procedures to determine how people conduct their work. Leaders tend to be efficiency-oriented and organized, prioritizing a smoothly-running organization above all. Formal rules and policy documents set the structure of the organization, and the long-term focus is on stability and results. Success for hierarchical cultures is largely defined in the context of reliable delivery, smooth planning, and low costs. According to Hill et al. (2014), hierarchy can impede the free flow of information and the generation of diverse ideas, and as such, although structure can serve

to simplify and focus efforts, it should be seen as a means to an end. This culture is closely tied to McGregor's (1966) theory x of management. According to theory x, employees primarily aim for security, dislike work, and avoid responsibility. While reliable delivery of results is ideal for a team focused on consumer needs, the formal rules and tendency toward micro-management within a hierarchical structure, particularly when leaders do not exercise trust in their employees, can undermine the morale of the team and limit the necessary flexibility to truly address a consumer's needs.

The third type of culture identified by Cameron and Quinn (2011) is the market culture, which is results-oriented and focused on job completion. Leaders in market cultures tend to be drivers, producers, and competitors at the same time. Market cultures are focused on winning, valuing competitive activities, and achieving measurable targets and goals. Success in market cultures is defined by high levels of market share and market penetration. Market cultures have their roots in economic theory, specifying that the allocation of resources across processes is determined by the expected return on those investments (Vlachou & Christou, 1999).

The fourth culture, known as an adhocracy, is dynamic and entrepreneurial. Employees and leaders in these cultures tend to take risks, and these organizations are committed to experimentation and innovation. Success for these organizations is defined by establishing new products or services and being recognized as a pioneer in the field. Leadership in an adhocracy culture is based in contingency theory and is heavily reliant on the situation to determine the right approach, given the highly-complex and frequently-changing nature of the organization (Scott, 1981). Cameron and Quinn (2011) defined these cultures by mapping the dimensions of an internal and external focus and a tendency towards stability or flexibility in a 2x2 matrix.

Teams may also move between an inward and outward focus or increase in flexibility when needed, making it difficult for a leader to define the team's values in practice (as opposed to a team's theoretical or aspirational values). For example, a leader may want to create a team that values cohesion and functions as a tight social network but on a day-to-day basis operates functionally through a results-oriented approach, valuing competition and achievement. Understanding and establishing leadership values that promote the organizational culture that best aligns with business and consumer needs is critical to leading any team, whether during normal times or in times of chaos or crisis. Within this context, it is important to consider that within:

> Highly cohesive groups, strong norms to preserve harmonious and friendly relationships can discourage candor… it is thus the leader's role to create dissonance by injecting different points of view and forcing the group to deal with them, by encouraging dissenting voices, and by bringing in new members who think differently and letting their voices be heard. (Hill et al., 2014, p. 31)

Hill et al. further noted that true collaboration entails far more than a simple willingness to work together; it should also involve passionate discussion and disagreement. It should also entail individuals who are able to feel as though they are a part of the whole without giving up their individuality. Hill et al. (2014) also argued that collaboration entails creative tension—a balance between "me" and "us" that amplifies differences and welcomes fresh perspectives in constructive disagreement, but this constructive disagreement and passionate discussion cannot take place without an environment of psychological safety.

Styles

When aligned with the team's overarching shared values, leadership styles serve as a scaffolding within which a team's individual and joint professional development can occur. Given the potentially outsized impact that private sector intelligence professionals may have on leadership decision making, it is all the more important to establish the right foundation and leadership approach for these professionals in order for them to thrive amidst a global landscape marked by increasing volatility, uncertainty, complexity, and ambiguity. There is a myriad of considerations for leaders operating in a VUCA context to address in order to ensure that a geopolitically-focused intelligence team operating within an MNE is able to effectively operate in a complex and changing environment. Maintaining the efficacy and motivation of these team members requires a unique approach. These considerations include the cultural concerns of communication, trust, and participative leadership; shoring up perceptions of competency, autonomy, opportunity, and personal growth; and ensuring that structure, staff and skills development, leadership style, shared values, and systems (processes and procedures) all support the broader business strategy (Illes & Matthews, 2015). As intelligence teams have the potential to have a substantial impact on their businesses, those who lead these teams must take a holistic approach to anticipate and address issues before they arise.

Three leadership approaches that align with individual talent development, maintaining a flexible structure, encouraging job enrichment, and autonomy support are transformational leadership, participative leadership, and authentic leadership.

Autonomy-supportive Leadership

Autonomy-supportive leadership is rooted in self-determination theory (Deci & Ryan, 1985). According to Deci and Ryan, autonomy refers to an individual having an experience of choice and a sense of volition. In this sense, an individual's actions are based on an internal locus, rather than non-volitional (Deci & Ryan, 1985; Reeve et al., 2003). Hocine and Zhang (2014) noted that self-determination theory has typically described autonomy-supportive leadership as serving to "facilitate, rather than undermine, the critical managing dimensions of autonomy support, involvement, and structure" (141). Hocine and Zhang further noted that autonomy-supportive leadership allows a follower to develop inner motivation indicative of a psychologically healthy worker. According to a 1994 study by Deci et al., when individuals are given a reasoning for a task, when their feelings and opinions regarding the task are recognized, and when they are given some level of choice regarding how they address the task, they begin to internalize the value of the task. Stone et al., (2009) highlighted the following six steps, based on self-determination theory, which aid in developing autonomous motivation:

(a) asking open questions and inviting participation in problem solving;

(b) actively listening and acknowledging employee perspectives;

(c) offering choice with structure and clarifying responsibilities;

(d) providing sincere, positive feedback that acknowledges initiative and factual, non-judgmental feedback about problems;

(e) minimizing coercive controls such as rewards and comparisons with others;

(f) developing talent and sharing knowledge to enhance competence and autonomy

Transformational Leadership

To build a positive organizational culture, a transformational leadership approach can be effective. According to Burns (1978), transformational leadership is a process that encourages growth in both leaders and followers. According to transformational leadership theorists Bennis and Nanus (1985), transformational leaders must create trust within their organizations. To do so, they must make their own positions known and then stand by them. Bennis and Nanus further noted that when leaders build trust in an organization, the organization gains a sense of integrity that is analogous to a healthy identity. Further, Avolio (1999) suggested that transformational leadership has a moral dimension, and Burns suggested that transformational leadership involves moving people to increasingly higher standards of moral responsibility, motivating followers to move beyond their own self-interests for the greater good. Bass (1985) contended that a transformational leader is a model of integrity and fairness, sets clear goals, has high expectations, encourages others, provides support and recognition, stirs emotions, gets people to look beyond their own self-interests, and inspires people to reach for the improbable.

Participative Leadership

Characterized by free-flowing and honest communication with subordinates, participative leaders remain easily accessible, stress development for subordinates, express consideration and support, and are willing to change (Greiner, 2014). Participative leaders are considered sensitive, extroverted, and emotive, and tend to stay in close contact with subordinates to remain attuned to their needs (Greiner, 2014). Rolková and Farkašová (2015) also highlighted that having participative leaders is positively associated with high levels of job satisfaction and encourages employee involvement in decision making and problem solving. This leadership style empowers

employees, allows for initiative and creativity, and is autonomy supportive. Greiner (2014) also asserted that this style of personalized leadership benefits not only organizational performance but also the leader's mental health.

Authentic Leadership

The personalized leadership style of participative leadership also aligns with the concept of authentic leadership. According to Hersted and Frimann (2016), authentic and individualized communications and relationship-building skills are critical for leaders as they seek to construct their leadership identity. This process is ongoing as leaders continue to define themselves through continuous interactions. While much of the literature on authentic leadership describes authentic leadership in relation to self-awareness of one's fundamental values and purpose, wherein the leader's values and behaviors are in alignment (Kouzes & Posner, 2002; Luthans & Avolio, 2003), Sparrowe (2005) argued instead that authentic leadership emerges from the narrative process in which others help to construct the leader's identity. Whether constructed in relation to followers or as a result of self-reflection, Luthans and Avolio (2003) highlighted declining hope and confidence in leadership in the corporate environment. They suggested that the type of leadership required to restore this confidence comes from individuals who are true to themselves and whose transparency has positive transformational power to develop their followers into leaders. As such, authentic leadership is marked by high moral and ethical standards (Luthans & Avolio, 2003).

According to George (2003), authenticity requires that a leader be the person they were created to be rather than developing the image or persona of the leader they are expected to be. Kouzes and Posner (2002) similarly suggested the importance of finding one's own voice, rather

than echoing others' sentiments in building credibility. Bass and Steidlmeier (1999) defined the true self as being marked by the values or ethics that shape a leader's "idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration" (p. 185). Luthans and Avolio (2003) described the profile of an authentic leader as confident, hopeful, optimistic, and resilient.

This profile of an authentic leader also helps explain how leaders perceive and relate to their subordinates. Social psychologist McGregor (1966) argued that managers' perceptions about what motivates their subordinates can affect their management styles. McGregor's theory x and theory y thus map to authoritarian and participative management, respectively. According to theory x, managers who believe their team members dislike their work and possess low motivation will believe their teams require a more hands-on leadership approach (McGregor, 1966). According to theory y, on the other hand, when managers believe their employees take pride in their work and see it as a challenge, this results in managers entrusting their employees to take greater ownership of their work (McGregor, 1966). Aligned with McGregor's work, Greiner's (2014) study of 318 executives' perceptions of participative leadership found that the element of participative leadership with the highest effectiveness rating was concerned with training and developing subordinates, which places considerable value on the role of manager as teacher rather than as decision maker (Greiner, 2014). While it is important to note that the executives surveyed in this study were involved in a U.S.-based leadership development program, raising the likelihood that they were exhibiting western perceptions of leadership, a separate study by Lythreatis et al. (2017) found that participative leadership led to positive corporate social responsibility perceptions and strong organizational identification in the Middle

East and North Africa regions, indicating that participative leadership may be positively viewed beyond the West.

Cross-cultural Leadership

The nuances that cultural perceptions place on leadership styles are particularly important because intelligence teams are geopolitically focused and, in many cases, geographically dispersed around the globe. Thus, leaders must also consider a cross-cultural leadership approach. In this context, leaders must take into account the impact of differences in national or regional culture on leadership and followership styles. These differences also extend to the areas of communication and trust (Meyer, 2014). In the midst of uncertainty, the importance of these cultural considerations within MNEs is heightened, particularly when resultant fiscal, socio-political, and psychological strain play out on a global scale. In this context, fear and uncertainty can be exacerbated, highlighting the importance of leaders in building trust across cultural and geographic boundaries.

According to Meyer (2014), communication occurs on a continuum between low-context and high-context, with low-context communication consisting of precise, clear, and simple communication wherein messages are expressed and understood at face value. In high-context communication, good communication is sophisticated and nuanced, with meanings implied but often not clearly expressed. In the United States, communication tends toward low-context, whereas in many Asian countries, in contrast, communication tends to be more high-context (Meyer, 2014). Meyer also placed trust on a continuum between task-based and relationship-based. Task-based trust is built based on the practicality of the situation. Consistency and reliability in business-related activities build trust, and work relationships are built and dropped

easily, depending on what is required to accomplish the task at hand. In relationship-based trust, work relationships are built slowly, over time, based on personal time spent together. In the United States, task-based trust is much more prevalent, whereas in many Asian cultures, trust is built through more long-term relationships (Meyer, 2014).

In The Global Leadership and Organizational Behavior Effectiveness (GLOBE) study, House et al. (2014) sought to understand the influence of societal culture on leadership and organizational processes. As globalization has increased the prevalence of dispersed leadership and the employment of personnel from many different countries, cultural influences have become increasingly relevant as leaders work in a cross-cultural context. The authors of the GLOBE study primarily viewed leadership theories from a contingency framework—incorporating cultural variables (House et al., 2014) and aiming to understand limitations in transferring leadership theories across cultures. Contingency theory seeks to match leaders to appropriate situations, suggesting that a leader's effectiveness is contingent on how well their style fits with a given context (Fiedler & Chemers, 1974).

When viewed through the lens of the GLOBE study, there are some similarities in cultural values regardless of national or regional culture. For example, many companies have a U.S.-based corporate headquarters, with lines of business or segments based regionally around the globe. U.S.-based leadership may exhibit many of the typical leadership traits common to multiple different cultures, including a high orientation towards performance, a tendency towards competition, and a focus on results (House et al., 2014). They may also exhibit some leadership qualities that are more culturally-specific, including valuing charismatic and participative leadership or a team-oriented structure. When a leader and their team are tasked to work with a

leader from a south Asian culture who also operates in a culturally-specific framework, tending towards self-protective leadership and viewing participative leadership as less effective, there can be a culture clash, making communication a challenge resulting in an erosion of trust.

One core element of these cultural differences is found in the Power Distance Index (Hofstede et al., 2010). Power distance is a dimension of culture that addresses the emotional distance that separates subordinates from their leaders and identifies how the supervisor-subordinate relationship is impacted by the inequality that occurs in any culture. This differentiation is important because in countries in which employees are relationally closer to their bosses, bosses tend not to be as autocratic. In these environments, employees tend to prefer a consultative style of decision making. However, in countries wherein employees express a level of fear in disagreeing with their bosses, employees are less likely to prefer a consultative style of leadership. As such, the Power Distance Index describes the level of dependence or interdependence between a boss and their subordinates, with subordinates in large power-distance countries preferring greater dependence on their bosses. Subordinates in lesser power-distance countries tend to prefer a more interdependent relationship (Hofstede et al., 2010). As evidenced by the value that U.S.-based executives place on participative leadership, a western orientation favors greater interdependence, which may cause challenges in communicating and relating to employees from different cultural backgrounds (Hofstede et al., 2010). While a participative leadership approach may be more aligned with western perceptions, it has seen positive results beyond western cultures.

According to House et al. (2014), self-centered and internally-competitive leadership behaviors have generally received negative ratings, indicating that “status conscious,

bureaucratic, and face-saving leadership behaviors may be more nuanced and depend on the specific culture" in which the leader is operating (House et al., 2014, p. 83). Self-protective leadership attributes are expected to be a part of the prototype of leaders in societies that value high power-distance (House et al., 2014). When seeking to identify universally-admired leadership traits across cultural contexts, the overarching view in research is that culture is a causal variable that affects leadership behaviors and also moderates the effectiveness of leadership behaviors (Elenkov & Manev, 2005; Geletkanycz, 1997; Offermann & Hellmann, 1997). As such, because of increased globalization, leaders in MNEs who operate primarily in regions where culture-specific leadership behaviors are generally accepted must also ensure that their leadership style is aligned with those attributes that effectively cross cultures, and in particular with the values of their corporate headquarters. Dorfman et al. (2004) and House et al. (2014) identified universally admired cross-cultural leadership characteristics which include integrity, charisma, strong values, and excellent interpersonal skills. Other universally-promoted attributes include being encouraging, a team builder, a win-win problem solver, positive, communicative, and coordinative (Dorfman et al., 2004; House et al., 2014).

According to the culture congruence hypothesis (House et al., 1997), leaders tend not to deviate substantially from the leadership attributes expected in their culture. Thus, it is likely that teams that are required to operate in a cross-cultural context may find that leadership from some south Asian countries, for example, may be unaccustomed to having their authority or decisions challenged, particularly by those who are perceived to be lower in rank or stature, regardless of their experience or expertise, as it is viewed as insubordinate. Conversely, respectful disagreement tends to be more widely accepted in western cultures. Dickson et al. (2003) built

on the work by House et al. (1997) and noted that there has been a decline in the quest for universal leadership principles that apply equally across all cultures. Aligning instead with contingency theory, Dickson et al. (2003) noted an increased focus on the application of the dimensions of culture identified by Hofstede et al. (2010) and others who articulated variation in leadership styles, practices, and preferences.

Similarly, Trompenaars and Hampden-Turner (2015) described seven dimensions of culture, specifying that cultures differ in specific, predictable ways due to their particular values and beliefs. For example, there is a distinct difference in how the United States and South Asia view status (achievement versus ascription), with Anglo societies valuing performance and using titles only when relevant (Trompenaars & Hampden-Turner, 2015). Professionals from South Asia are more disposed to using titles to validate and justify status and authority. Further, in South Asian cultures, there is a natural aversion to close collaboration with external groups or in consensus building in decision making (Trompenaars & Hampden-Turner, 2015).

Staff and Skills

Leadership styles also serve as a critical link between the overall strategy of the team and the identification of staffing requirements and skills development on the team. Theorist Magrassi (2002) defined human capital as the knowledge, talents, skills, abilities, education, experiences, intelligence, professional qualifications, training, working knowledge, judgement, job competence, cultural diversity, and wisdom of individuals. In a collective context, these resources together then represent the overall capabilities of the group which can be brought to bear on the goals or objectives of an organization. According to Magrassi, these are some of the intangibles that are difficult to account for in a company's fiscal outlook. Due to the many

similarities between the intelligence professionals' general capabilities and the skills and competencies that they employ, the impact of these two factors is similar in the overall strategic framework.

Cummings and Worley (2016) noted that the mix of skills, personal characteristics, and behaviors of organization members are all influenced by the organization's mechanisms for selecting, developing, appraising, and rewarding organization members. An organization's strategy must consider the skills and knowledge required if the organization is to be successful. From a historical perspective, Hackman and Oldham (1980) highlighted that demographic variables—age and education—as well as concepts such as experience, knowledge, skills, and abilities, can affect how team members relate to each other. These concepts also feed into whether group members have the necessary skills and knowledge, including interpersonal skills, which influence group behaviors. According to the McKinsey 7S framework, skills generally refer to the overarching talents and capabilities of an organization's staff, whereas the staff itself generally refers to the workforce as a whole—in particular, its size and demographic (Waterman et al., 1980). However, in a knowledge-based organization the skills are often based on the training and experiences of the staff, and thus the capabilities and staffing are intertwined, and the skills of individual employees can influence and impact the size and bandwidth of the team.

Job Responsibilities

One significant challenge that many private sector intelligence professionals have encountered is that without a standard definition of intelligence, titles are not always indicative of the actual skills and competencies that employees bring to the table, and defining an intelligence professional as an analyst or a manager, for example, is often not truly indicative of

the wide array of aptitudes they possess or the job tasks they are asked to perform. The range of experience of those in the intelligence profession varies greatly. Some hold management or project management responsibilities; some possess varying types of government or military experience; some have lived or worked abroad; some have foreign language skills; some hold advanced degrees (Robson, 2022). As an example of this variation, in a 2021 study, 126 private sector intelligence practitioners were asked, "What is your job title?," their responses produced 98 different answers, which were standardized down to 72 distinct titles, meaning two-thirds of the titles were not shared by other respondents (Robson, 2022). Robson contextualized this within the pathway to professionalization by comparing it with the well-established law profession, which has recognized levels across companies. In private sector intelligence, however:

> Practitioners' levels are set by their companies, which can cause confusion for hiring and benchmarking…When tested against survey respondents' years of experience…no correlation [was found] between the word 'senior' and years of experience. There was still no pattern when analyzed within industries. (Robson, 2022, p. 10)

Robson noted that common terminology is a critical step toward professionalization as it assists with entry into the profession, compensation benchmarking, and establishing "responsibilities to best apply intelligence in the private sector" (p. 10).

The lack of a cohesive descriptor for intelligence professionals and their job requirements in addition to an agreed upon definition of intelligence exacerbates the challenge of identifying appropriate staff and skills development for these teams. This lack of cohesion also presents a barrier to entry into the field with many interested candidates uncertain of which terms to use to

identify jobs that suit their particular skills or interests. This challenge is underscored when these professionals seek to move upward in the field without an established trajectory (Robson, 2022).

Ongoing Skills and Knowledge Development

As these professionals seek to learn and grow within their professions, it is also important to understand the type of ongoing learning that will need to take place in order for them to achieve increasing levels of competency in their roles. As the intelligence profession falls squarely in the cognitive domain, the increasing levels of Bloom's taxonomy (Bloom et al., 1956) can help to frame the intellectual growth and progression. Bloom's taxonomy can serve as the progression used when crafting an intelligence assessment, as well. According to Bloom et al. (1956), learning begins by acquiring knowledge, which consists of recognizing and remembering facts and basic concepts. It then moves to comprehension through organizing, comparing, and interpreting ideas. This is followed by an application phase, wherein acquired knowledge is used to solve problems and identify connections and relationships. Analysis takes place by breaking information down into its component parts, making inferences, and using information to support generalizations. The synthesis phase requires the use of the component pieces of information to form a cogent assessment. The ultimate evaluation phase requires making judgments based on set criteria and presenting and defending those stances (Anderson & Krathwohl, 2001; Bloom et al., 1956; Hoy, 2007).

While this analysis, synthesis, and evaluation must be conveyed to decision makers, to provide the most clarity possible and limit biases, evaluation entails much more than simply highlighting what is known or assessed to be true; intelligence professionals must also be clear about what their gaps are, as it is the unknowns that are most likely to lead to problems

(Lowenthal, 2017b). Transparency regarding uncertainty requires a level of vulnerability and professional confidence that must be cultivated to effectively anticipate potential concerns and maximize the value of these teams. Intelligence professionals also face a number of similar challenges in both the public and the private sectors, including balancing strategic and tactical intelligence, thinking outside the box, collaboration across sectors, misinformation, and understanding how to balance depth and clarity with brevity. These skills are often developed over time and on the job (Treverton, 2018).

These phases of intellectual growth and progression lend themselves to the establishment of a learning organization, which is one in which people continually expand their capacity to create results through nurturing new and expansive patterns of thinking, particularly in a group setting (Senge, 1990). According to Garvin (1993), a learning organization is one that is skilled at "creating, acquiring, and transferring knowledge, and at modifying its behavior to reflect new knowledge and insights" (p. 4). While intelligence teams operate in the space of learning and knowledge, Garvin argued that new knowledge alone does not create a learning organization. Rather, this knowledge must trigger changes in how things are done, lest the potential for improvement remain unrealized. Senge (1990) argued for the use of five "component technologies," including systems thinking, personal mastery, mental models, shared vision, and team learning to encourage this type of environment. Given that many intelligence professionals tend to be in their early to mid-careers, Malcolm Knowles' (1984) principles of andragogy are relevant to their continued education and learning. According to Knowles, the adult learner relies more on their experiences as a resource for learning as they grow older, and at the same time their self-concept in learning becomes increasingly self-directed. Most importantly, the adult learner generally wants to learn content that can be immediately applied, rather than postponing

application. As such, the learning focus for intelligence professionals should be focused on the immediacy of application for problem solving purposes, rather than theoretical knowledge.

Self-Determination Theory and Motivation

Within a highly-motivated and high-performing team, one key element to professional staff and skills development can be found in the employment of self-determination theory (Deci & Ryan, 1985) to understand and encourage the continued motivation of an intelligence cadre. Self-determination theory posits that human nature exhibits effort, agency, and commitment as "inherent growth tendencies" (Ryan & Deci, 2000). Similar to theory y leadership (McGregor, 1966), Ryan and Deci (2000) argue that employees are generally intrinsically motivated to succeed. According to self-determination theory, to foster these tendencies and encourage wellbeing, three basic psychological needs must be met. The first need is competence, which is indicative of an experience of mastery. The second psychological need, relatedness, is a connection to and experience of caring for others. The third need is autonomy, which does not refer to independence, but rather the desire to be a causal agent in one's own life (Deci & Vansteenkiste, 2004). According to a study by Nalipay et al (2020), provision of the three basic needs (relatedness, autonomy, and competence) correlated positively with achievement across cultures, providing broad support for the cross-cultural universality of self-determination theory.

According to Hill et al. (2014), employees involved in innovation need engagement and connection, which align with the psychological need of relatedness. Hill et al. further argued that workers need an "intellectual and emotional space" where they are able to "contribute their best efforts because they feel not only a part of the group, but also valued by and valuable to the group" (p. 29). Hill et al. further described this environment, noting that innovative professionals

need settings where “people [have] great latitude and autonomy” (p. 34). Both of these descriptions align with the concept of psychological safety.

Aligned with McGregor (1966)’s theory y, Herzberg et al. (1959) argue in two-factor theory, also known as motivation-hygiene theory, that individuals are likely to seek the gratification of higher-level psychological needs at work, including achievement, advancement, recognition, and increased responsibility (Herzberg et al., 1959). These psychological needs, in many ways, parallel the higher order needs on Maslow’s Hierarchy (Maslow, 1943), including belonging, esteem, and self-actualization. Herzberg et al. further argued that those job characteristics that lead to job satisfaction tend to come from the nature of the work itself, known as *motivators*. These motivators include challenging work, recognition, increased opportunity, personal growth, and involvement in decision making, all of which are intrinsic to the nature of the job itself. Those characteristics that lead to job dissatisfaction, known as *hygiene factors*, however, are generally tied to the work environment and are extrinsic to the work itself. These may include processes and procedures, status, supervision, and working conditions. Herzberg et al. highlighted that job satisfaction and job dissatisfaction are not on a continuum or mutually exclusive to one another, but rather can coexist at varying levels. Thus, a leader needs to understand how interpersonal relations and working conditions such as policies and procedures could impact the analysts’ perception of opportunity, personal growth, and involvement in decision making (motivators), and thus their levels of job satisfaction or dissatisfaction (Herzberg et al., 1959).

Diversity, Equity, and Inclusion

This environment of inclusion, which also aligns with the concept of psychological safety, is important to developing an organization that encourages creativity and innovation. According to Wiersema and Bantel (1992), diversity has been associated with higher levels of creativity and innovation. Diverse teams have also been shown to have improved decision making (Daily et al., 1999). Furthermore, more heterogeneous groups tend to consider a more comprehensive set of solutions and engage in more vigorous debate, leading to increased information processing and higher-quality decision making (Wiersema & Bantel, 1992). This inclusivity should also be extended to perceptions on what makes a good leader. According to Hill et al. (2014),

> Because leaders are more made than born, organizations must identify people with the right stuff for leading innovation and provide them with the experiences and resources needed to develop the required mind-set and skills. Yet, if today's high-potential leaders of innovation don't fit today's popular conception of a good leader, many of them will be invisible to current systems for identifying and developing tomorrow's leaders. (Hill et al., 2014, p. 225)

Growth Mindset and Job Enrichment

Given the motivated and intelligent nature of the professionals in question, encouraging a growth mindset will allow intelligence personnel to continue developing their talents and abilities through effort, training, and persistence, even in the face of setbacks (Dweck, 2006). A growth mindset is also integral to establishing a practice of team learning, expansion of capabilities, and personal mastery that is prevalent in learning organizations (Senge, 1990). A

growth mindset will also assist in establishing a shared vision that is based on systems thinking. As this growth mindset becomes ingrained, it will also be pertinent to offer opportunities for job enrichment.

Herzberg et al. (1959) proposed four ways to increase motivation and job enrichment factors for employees by increasing their opportunities to engage in the more meaningful aspects of their work through increased responsibility, challenge, and creativity. These include: increasing employee autonomy through granting greater accountability and responsibility while also removing some of the control that management has over employees; allowing employees responsibility over entire work units rather than only a portion; providing direct feedback on job performance to employees, rather than through supervisors; and encouraging the development of expertise through taking on increasingly challenging tasks.

Cultural Agility

Given the global nature of these intelligence professionals' work, another important element of skills development is cross-cultural competency. At the World Economic Forum, Schwab (2014) stated:

> The reshaping of our world requires professionals to develop a transformational mindset and constantly update their knowledge. However, this knowledge is becoming increasingly difficult to attain through traditional means, precisely due to the growing complexity, velocity and uncertainty in the world. (p. 1)

According to Caligiuri and Tarique (2012), a study of 420 global leaders found that extraversion, openness to experience, lower neuroticism, and cross-cultural experience—including both organization-initiated and nonwork-related cross-cultural experiences—served as predictors of dynamic cross-cultural competencies, including tolerance for ambiguity, cultural flexibility, and

reduced ethnocentrism. Thus, cross-cultural experiences, whether work or nonwork related, are critical to global professional development and building a pipeline of effective global leaders. As such, Wallenberg-Lerner and James (2014) suggested that corporations may wish to focus on developing both work assignments and career paths that aid in the development of values and priorities that cross cultural boundaries.

Gaps and Inconsistencies in the Literature

While the overall field of intelligence has been studied in great depth, this literature review highlights the scarcity of literature specific to private sector intelligence and in particular geopolitically-focused intelligence teams in multinational enterprises. As this particular field blends both the business world and work that has historically been done by governmental organizations, in many cases there is literature focused on one specific context that may or may not be applicable to the other. For example, although there is significant literature on professional and leadership development, leading innovation, and team building, all of which can be applied to this field, the applicability and generalizability of this literature may overlook critical nuances as the private sector intelligence field moves on the path toward professionalization. Thus, understanding to what extent a business framework can be applied to an intelligence context will support the development of this field. In this literature review, the researcher identified the lack of a broadly-accepted definition of intelligence, which could be a significant factor in supporting and defining both the intent and purpose of these teams, as well as the scope of their work and responsibilities. In many cases, researchers and authors have applied public-sector intelligence and national security literature to the private sector intelligence function, but studies applying business literature and frameworks that address organizational

development have not been applied to the field. As such, a baseline understanding and conceptualization of the field is lacking.

The review of the literature identified significant gaps in understanding leadership development from a private sector intelligence perspective. In particular, it is unclear what style of leadership is most likely to be effective in guiding this type of team, as well as individual professionals' perceptions of the strategies and shared values that encouraged efficacy and innovation for private sector intelligence teams. There is also a gap in the literature describing an effective organizational structure for these teams. A systems theory framework highlights the importance of alignment between strategy, staff and skills, systems, shared values, leadership styles, and structure, but does not dictate an ideal structure. Through layering on literature regarding innovation and the organizational cultures that support ongoing intellectual work and motivation, some themes emerge that may support the development of an effective structure, though to date, this has not been thoroughly studied in this particular field.

Another identified gap was the lack of literature on the organizational culture within which these teams operate. Many geopolitically-focused intelligence teams in the private sector fall within an organization's security department and also within a large corporate environment. Understanding the interplay between these two organizational cultures and how they align or conflict could provide a better perspective on the influence of environment on the intelligence team as a system. Finally, a theme throughout this research has been the challenge that uncertainty presents—both in team development and in business operations. This challenge has been addressed throughout the literature on uncertainty avoidance and leadership decision making; it has also been identified and discussed in public sector intelligence studies. However, this concept has not been addressed in private-sector intelligence-related literature.

Chapter Summary

This chapter began by documenting what is known about the field of private sector intelligence by illustrating what is known about the intent and utility of geopolitical intelligence teams working within private sector MNEs. The literature on systems theory was then synthesized with each element of the McKinsey 7S framework serving as scaffolding for a detailed review of academic journal articles and scholarly books on leadership and professional development literature. This conceptual framework provided a foundational understanding for the methodology and theoretical framework used to approach this study which are detailed in Chapter 3. This chapter also addressed the gaps and inconsistencies in the literature which serve as the basis for this study and further underscore the significance of this study in developing a greater understanding of the landscape of the private sector intelligence sector and the components that go into building and leveraging geopolitically-focused intelligence teams in MNEs.

Chapter 3: Research Methodology

Chapter Overview

In this chapter, the rationale and methodology for this study are outlined. The purpose of this chapter was to lay out the structure of the study, allowing for replication by an experienced researcher (Rudestam & Newton, 2007). The chapter provides an overview of a qualitative case study approach (Creswell & Poth, 2018; Maxwell, 2009) and subsequently discusses the protocols and procedures used to conduct the study in accordance with human subject considerations. Headings for this chapter include: Introduction, Case Study Design, Setting and Sample, Human Subject Considerations, Instrumentation, Data Collection, Data Analysis, and Chapter Summary.

Context

The purpose of this global case study was to explain, using a systems theory lens, the interdependence of the components involved in building and leveraging geopolitically-focused intelligence teams in U.S.-based private sector MNEs. As such, the principal research question guiding this inquiry was: How, if at all, does systems theory explain how geopolitically-focused intelligence teams operate in the private sector? Seven subquestions were used to explore the perceptions of former team members at one particular MNE—The Global Company—through a systems theory lens and were also employed during the collection and analysis of interview data. A questionnaire based on these subquestions was also used with private sector intelligence professionals not employed by The Global Company to situate the interview data in the private sector intelligence field and to assess transferability of the findings. The subquestions were:

- SQ1: What knowledge, skills, and abilities might need to be present on this type of team?

- SQ2: What type of human and other resources might be required to adequately address the business requirements levied upon this type of team?
- SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?
- SQ4: What considerations could be taken into account when developing a private-sector intelligence team's structure?
- SQ5: What systems or processes could be put in place to best leverage a private-sector intelligence team?
- SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?
- SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?

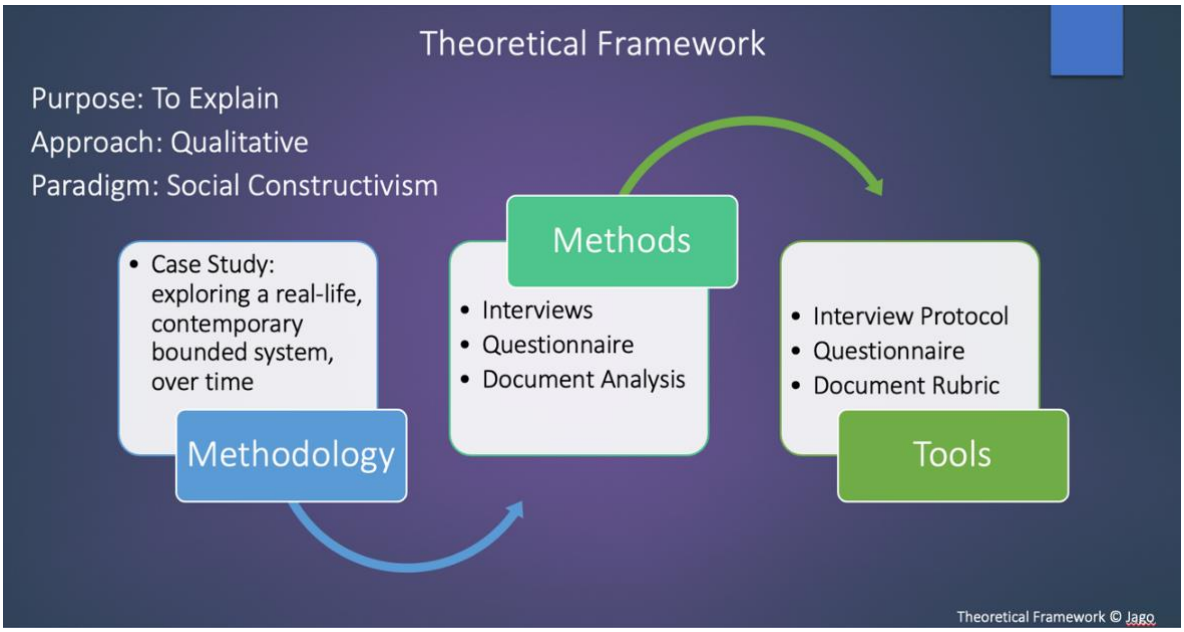
Theoretical Framework

As this study sought to understand the interconnected nature of the components involved in building and leveraging intelligence teams in the private sector through the perceptions and experiences of practitioners at a specific point in their professional lives, a social constructivist paradigm was used in this study (Berger & Luckmann, 1967; Van Manen, 2014). According to Creswell and Poth (2018), the constructivist epistemology views knowledge of the world as an individual construction, and in particular through social constructivism, individuals seek to understand the world in which they live and work by developing subjective meanings of their experiences, resulting in a complexity of views negotiated through social interactions and through historical and cultural norms.

The constructivist worldview aligned with this study's effort to make sense of the private sector context in which geopolitical intelligence analysts work, based on their historical and social perspectives. In this way, the generation of meaning was social, based on interrelationships between people and between people and the context in which they operated (Crotty, 1998). The items developed for this study's interview instrument were broad and general so that participants could construct meaning (Creswell & Poth, 2018); these items focused on the context in which interviewees worked in order to understand their historical and cultural settings. A social constructivist worldview aligns well with open systems approach, as it accepts the operating context as a key element in the development of meaning, just as it plays an influential role in a system's operations. Further, the social constructivist paradigm also aligns with equifinality, because it does not seek to identify one "correct path", but rather to understand the overall field through myriad concepts and considerations. Jago's Theoretical Framework (2021) was used for this study and is depicted in Figure 2.

Figure 2

Theoretical Framework



Research Design

The qualitative case study approach allowed for an in-depth analysis of geopolitically-focused private sector intelligence teams as viewed through a systems theory lens. It also allowed for an analysis of these teams' internal operations in the context of their global remit and mission. This study leveraged a multi-method approach, first focusing on one particular intelligence team, but situating the data collected from interviews of this team within the broader private sector community through a qualitative questionnaire, in order to assess generalizability and transferability. This approach was bounded by the 15-year timeframe of one team's existence and used semistructured interviews to look at the perceptions of team members regarding the structure, strategy, systems, skills, staffing, shared values, and leadership styles that were a part of the team's operations during that period. This study aimed to add to the body of knowledge regarding building and leveraging intelligence teams in the private sector—a nascent field—through understanding one case study in-depth and looking for the general themes associated with the team's development within an organizational cultural and geopolitical context. This study evaluated the focused strategy, organizational structure, internal operating systems, staff and skills development, leadership styles, and shared values of the intelligence team in light of changing corporate and geopolitical contexts.

According to Creswell and Poth (2018), qualitative research originated in the fields of anthropology, sociology, and humanities. As a result of its roots in these differing fields, the case study research design is also found in many fields and is used particularly for evaluation, wherein a researcher develops an in-depth analysis of a case and collects detailed information using multiple data collection procedures over a sustained period. Gerring (2012) noted that qualitative case studies tend to be idiographic in nature, describing culturally-created, subjective

phenomena. Gerring defined case studies as "an intensive study of a single unit…for the purpose of understanding a larger class of similar units" (p. 37). Case studies rely on evidence derived from a single case that may be used to shed light on a broader set of similarly-situated cases (Gerring, 2012). Case studies also provide rich descriptions (Brady & Collier, 2010). According to Yin (2014), a case study is defined as "an empirical inquiry that investigates a contemporary phenomenon (the 'case') in depth and within its real-world context" (p. 16). Yin further described three applications of case studies: first, as complementary information to a larger evaluation; second, as the primary evaluation method (the main case); and third, as part of a multi-level evaluation wherein the case study may play multiple roles, and one or more subevaluations may also take place. This case study is helping to establish a foundational understanding of the field, and as such, there is the potential for the case study to serve in a variety of roles with the potential for subevaluation to take place as well. According to George and Bennett (2004), case studies can be particularly useful in exploring situations of causal complexity where equifinality may be a factor or in situations where complex combinations of necessary and sufficient conditions may be present; this is particularly relevant to a systems theory approach. According to Mcleod (2008), case studies, even those using relatively small population or sample sizes, are particularly useful in exploratory research, as they can assist in developing new ideas, illustrate the applicability of theories, and demonstrate interrelationships between concepts. Given the relative nascency of the private sector intelligence field, this is particularly relevant to this study. Moreover, the addition of a qualitative questionnaire to position the in-depth research of one firm alongside the broader field helps to mitigate the potential that the conclusions derived from the experiences and perceptions of intelligence professionals associated with The Global Company may not be transferrable to other firms

across the community. In this regard, alignment between questionnaire and interview responses would indicate that perceptions of interviewees are likely applicable beyond The Global Company and extend to private sector intelligence teams more generally.

For this study, the following qualitative research design methods were also considered but rejected, and the rationale for each is explained.

Ethnography, which is derived from the traditions of anthropology and sociology, allows the researcher to study the shared patterns of behaviors, language, and actions of an intact cultural group in a natural setting over a prolonged period of time, using data collection involving observation and interviews (Creswell & Poth, 2018). Ethnography was not the primary research design method used for this study because the researcher did not intend to rely on field notes and observations for data collection, given that much of the case study was historical. However, an ethnographic lens was employed in considering group interactions and evolution, given the shared setting. According to Schwandt and Gates (2018), ethnographic case studies are studies that employ "ethnographic methods and [are] focused on building arguments about cultural, group, or community formation or examining other sociocultural phenomena" (p. 344).

Phenomenological research, derived from the philosophy and psychology traditions, is a design of inquiry in which the researcher explores the lived experiences regarding a phenomenon as described by participants (Creswell & Poth, 2018). While this design results in a robust descriptive narrative, it was not clear at the outset of the study whether the changing geopolitical and organizational contexts had resulted in differing experiences for the individuals within the study.

Grounded theory, derived from sociology, is a research design wherein the researcher develops a broad, abstract theory of a process, action, or interaction grounded in the view of

participants. According to Creswell and Poth (2018), this process relies on multiple stages of data collection, and the categories of information are refined based on the data. Given the interest in layering on a systems theory lens, interrelationships between some of the categories did arise, and some new themes emerged. However, the researcher opted primarily to predetermine a number of categories for coding purposes based on the McKinsey 7S model (Waterman et al., 1980).

Although these other designs were considered for this qualitative inquiry, the case study research design was determined to provide the best fit in this context because equifinality was involved, and the case study design allowed for the researcher to use an open interview format to understand the perceptions and experiences of a specific team, bounded within a specific timeframe.

Setting and Sample

The study took take place within a well-established private sector Fortune 500 multinational corporation. The specific focus of this study was a single analytical intelligence team that has existed for approximately 15 years and that typically averaged between four and eight members at a time. The analytical unit existed within the company's security department. The team's remit focused on geostrategic intelligence to support decision making for the company's global business operations. Interviewees included former employees at three distinct levels: analyst and senior analyst, manager and senior manager, and director. All interviewees were directly involved in the company's intelligence team at some point over the course of the last 15 years—from the inception of the team until May 2021. These employees were formerly employed by the organization at the corporate level and had a global remit. All known previous members of the team were invited to participate; members currently employed on the team were

invited to participate in the pilot study to evaluate the interview protocol but were not invited to participate in the study, and their data were not collected.

Although the researcher reached out to all identified former members of the team, of which there are approximately 20, the researcher recognized that there were some members who were likely to be unreachable and/or who may have been unwilling to participate in the study due to their previous experiences. As such, the researcher assessed that the sample size would likely be approximately three-quarters of the overall population, resulting in 15 interviews. Thus, the data are reflective of a sample of convenience (as opposed to a random sample), thus yielding results that may not be indicative of the views of the entire population. However, according to Maxwell (2009), the generalizability of qualitative studies is often based on the development of a theory that can be applied to other cases (Becker, 1991; Ragin, 1987), rather than explicit sampling of a defined population. As a form of analytic, rather than statistical generalization, this is typically seen as "transferability," as opposed to "generalizability" (Guba & Lincoln, 1989; Yin, 2014). In this regard, respondents' assessments of the generalizability of the data, the similarity of both constraints and dynamics with other situations, corroboration from other studies, and the understood or presumed depth or universality of the phenomenon studied all lend credibility to generalizations made from case studies or nonrandom samples (Hammersley, 1992; Maxwell, 2009; Weiss, 1994). Because the researcher anticipated that commonalities were likely to be found in the perceptions of employees who shared similar job responsibilities, the researcher also sought a purposeful stratified sample (Creswell & Poth, 2018). This was done by seeking representation from multiple levels on the team, including at the analyst and senior analyst level (individual contributor), at the manager and senior manager level, and at the director level. The researcher also anticipated that similarities would be found during specific

periods of time, due to a shared experience of the organizational culture within the company or the geopolitical context.

A separate questionnaire was distributed to the broader private sector intelligence community to situate the interview data. The researcher used a Survey Monkey link to disseminate the questionnaire via the researcher's professional network, including posting on LinkedIn; through the Europe, Middle East, and Africa Analyst Roundtable, within AIRIP; and through the Overseas Security Advisory Council. Although there is, at present, no definitive indication of the overall population of the geopolitically-focused private sector intelligence field, estimates by other researchers in the field indicate that the global population of geopolitically-focused private sector intelligence professionals is likely under 1,500 people (M. Robson, personal communication, June 28, 2021). Similarly-focused surveys and questionnaires have garnered approximately 100 responses when deployed within these groups (L. Sage-Passant, personal communication, June 28, 2021). Similar to the interview protocol, the questionnaire also collected data regarding the professional level at which the respondent worked (individual contributor, manager, or executive), given the potential for similarities in perception based on level of seniority and/or years of experience in the field.

Human Subject Considerations

The three core human subject considerations from *The Belmont Report*: respect for persons, beneficence, and justice (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1978) were integrated into this study. Given constraints due to an ongoing global pandemic, an important aspect of ensuring safety for all participants in this study included conducting all interviews in a virtual setting in order to adhere to the recommended social distancing measures of the Centers for Disease Control (CDC) and the

World Health Organization (WHO). Another critical consideration entailed securing permission from each participant, which included informed consent. Each interview lasted approximately one hour and took place outside of the participant's core work hours to avoid any work-related conflicts, unless otherwise requested by the participant. All meetings took place via Zoom video conferencing, thereby allowing the participants to select the location of their choice for the interview.

The questionnaire was also deployed in a virtual context, and informed consent was secured prior to proceeding with the questionnaire. Each respondent was able to respond at the time and place of their choosing. The questionnaire required approximately 15 minutes to complete.

Informed Consent

Participants who took part in the study were issued, in advance, an informed consent form, information regarding the purpose of the study, and an overview of Pepperdine University's Institutional Review Board protocol. For interviewees, a copy of interview items was also provided in advance of the interview. The informed consent forms for interviews and the questionnaire are included in APPENDIX A and APPENDIX B, respectively.

Confidentiality of Interviews

The confidentiality of all interview participants was maintained throughout the research process. To mitigate the risk of exposure and to protect the identities of all participants, pseudonyms were used throughout the data management and data analysis process, as well as in the reporting of research results and findings. No identifying information is reported in the study, including organization names or specific locations. The identities of the interview subjects are known only to the primary researcher, and the data and identifying information (including

recorded interviews, transcriptions, notes, and coding worksheets) were only collected and analyzed and available to the primary researcher, though deidentified data were provided to a second coder to ensure intercoder reliability. All data remain secured on the primary researcher's password-protected and encrypted laptop computer and backed-up on a password-protected, encrypted cloud drive. All cloud folders were used only for this research project and will be deleted within three years of the study's completion. Paper notes, files, and worksheets were not used for this study.

Anonymity of Questionnaire Responses

The anonymity of all questionnaire respondents was also maintained throughout the research process. To mitigate risk of exposure and to protect the identities of all participants, no identifying information was collected for this study, including names, organization names, or specific locations. Pseudonyms were employed where necessary, including in the reporting of research results and findings. All questionnaire data, including the researcher's coding worksheets, were collected and analyzed and are available only to the principal investigator, though de-identified data were provided to a second coder to ensure intercoder reliability. All data are secured on the principal investigator's password-protected and encrypted laptop computer and backed-up to a password-protected, encrypted cloud drive. All cloud folders were used only for this research project and will be deleted within three years of the study's completion. No paper notes, files, or worksheets were used for this study. The identities of the human subjects are not known to the principal investigator, though the respondents were provided with the researcher's contact information if they are interested in further information on the study and/or want a copy of the study results.

Voluntary Participation

Participation in the study was voluntary, and participants had the right to request to be removed at any point in the research process. Upon the study's conclusion, participants were also provided with an opportunity to review the study results. Data have been reported only in the aggregate, and no physical research records have been maintained; all digital data will remain on a password-protected computer and backed-up to a password-protected and encrypted cloud drive that was used solely for this study. For interviews, steps were taken to mitigate exposure and maintain confidentiality, but the nature of personal interviews eliminated the possibility of offering full anonymity to study participants. For the questionnaire, anonymity was maintained, and no identifying data were collected.

Benefits of the Study

This study contributes to the growth and development of the private sector intelligence profession. Improved leveraging of intelligence in the private sector will allow for improved decision making at senior corporate levels and enhanced security, both domestically and abroad, for private-sector organizations. This, in turn, may lead to enhanced economic growth and corporate responsibility, leading to increased stature and improved financial prospects for individuals within the field. Leaders with a stronger background in cross-cultural affairs will improve organizational culture and enhance business efficacy in an increasingly globalized world. This improved leadership in the field of private sector intelligence could directly benefit participants due to an improved work environment for participants. Although the concept of intelligence has been in existence for centuries, the use of intelligence within the private sector has only recently begun to evolve beyond its inception, and efforts to professionalize the private sector intelligence field remain relatively nascent. As a result of this nascency, this study will

also provide a voice for interviewees and respondents who function in a profession that has been understudied and may not be well understood.

Risks of Participation

The risks associated with participation in this study were assessed to be minimal. Given the anonymous nature of the questionnaire responses, the risks that questionnaire respondents faced differed from those faced by interviewees. However, steps were taken to mitigate against potential risks of participation for both questionnaire respondents and interview participants.

Interviews. As The Global Company is popular and engenders great affinity, there was a risk that some participants would feel discomfort with the in-depth nature of the items, particularly if their answers could have cast the organization in a negative light. It was equally possible that participants may have experienced boredom with a line of questioning that did not align with their interests. Further, given the often hectic and chaotic pace of work in this field, participants may have faced a level of fatigue—particularly as interviews were done over video calls, and Zoom fatigue has become increasingly prevalent throughout the COVID-19 global pandemic. Finally, there was a risk that participants may have experienced some anxiety regarding a potential breach of confidentiality and possible follow-on impact to their job or standing within the private sector intelligence community.

To mitigate these risks, participants were informed repeatedly throughout the interview process that they were free to opt out of any portion of the study at any time, and all items were optional. The interview site(s) and time(s) were selected to ensure comfort for the participants, and as in-person interviews were not feasible, particularly given the existence of a global pandemic, video interviews were conducted at a time that was convenient for the participant. Participants were reminded during recruitment, selection, and at the outset of the interview that

pseudonyms would be employed throughout the study to mitigate against the risk of a breach of confidentiality. A copy of the recruitment script for interview participants is included in APPENDIX C.

Questionnaire. As the private sector intelligence field is still in the nascent stages of professionalization, there was a risk that some respondents may have felt frustration with the broad nature of the questions, particularly those that are early in their careers or new to the field. There was also a risk that participants could have experienced boredom with a line of questioning that did not align with their interests or appear to yield immediate benefits. Further, there was a risk that respondents may have faced a level of survey fatigue, given that there have been several recent surveys and questionnaires deployed within these professional networking groups. Finally, respondents may have experienced some anxiety regarding a potential breach of anonymity which could impact their job or standing within the private sector intelligence community.

To mitigate the risks, respondents were informed at the start of the questionnaire that they were free to opt out of any portion of the questionnaire at any time, for any reason, and all questions were optional. The questionnaire was deployed virtually, allowing respondents to respond at the time and place of their choosing. Respondents were also reminded during recruitment and initiation of the questionnaire that no identifying data were being collected and that pseudonyms would be employed throughout the study to mitigate the risk of exposure and ensure anonymity.

The principal investigator's involvement in the private sector intelligence field through a number of professional networking organizations and personal relationships of varying degrees with study participants may have introduced some degree of bias but did not constitute a conflict

of interest as no financial or business relationship existed with any individual within this study. However, to mitigate against any bias, reflexivity and bracketing were employed as described in the Data Validity section of this study. While the researcher had a professional relationship with many of the participants, the researcher ensured that none of the researcher's direct reports, nor anyone for whom the researcher had direct management responsibility were included as participants in the study.

All research was conducted consistent with Title 45, Part 46 of the U.S. Code of Federal Regulations, the standards and recommendations of the *Belmont Report*, and the policies and direction of Pepperdine University's IRB. A detailed application was completed and approved by the Graduate School of Education and Psychology's IRB office. The IRB approval letter is included in APPENDIX D.

In addition to the rights, which were communicated to participants, interviewees were also provided with the opportunity to review transcripts of their participation in the study and to have access to the principal investigator's findings by requesting a copy of the final study. Participant rights included:

- The right to confidentiality;
- The right to be fully informed about the study's purpose and about the involvement and time required for participation and to ask questions of the principal investigator;
- The right to refuse to participate, to refuse to respond to any items, or to withdraw from the study at any time without any negative ramifications (Richards & Morse, 2013, p. 263).

Instrumentation

Data for this study were collected from three primary sources: semistructured interviews, a questionnaire, and document analysis. Table 1 shows how the three data sources map to one another and to the McKinsey 7S framework, establishing a more holistic and integrated view of the case study and demonstrating how the data can be triangulated effectively. This table is also included in APPENDIX E.

Table 1

Mapping Tool

McKinsey 7S	Research Subquestion	Questionnaire	Interview Protocol	Document Review
Structure	SQ4: What considerations could be taken into account when developing a private-sector intelligence team's structure?	Q4: What considerations do you believe should be taken into account when developing an effective structure for a private-sector intelligence team?	Items 9, 10, 11, 12	Organizational Charts
Systems	SQ5: What systems or processes could be put in place to best leverage a private-sector intelligence team?	Q5. What internal systems, processes, or procedures do you believe should be put in place to best leverage a private-sector intelligence team?	Items 6, 7, 9a, 13, 14, 15	Standard Operating Procedures
Strategy	SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?	Q3. What elements might need to be considered in developing a strategy for a private-sector intelligence team?	Items 1, 2, 5, 6,	Best Practices, Job Descriptions, Organizational Charts, Standard Operating Procedures
Shared Values	SQ6: What elements of organizational culture could be accounted for when	Q6: What values do you believe must be accounted for to develop and effective organizational culture for	Items 16, 17, 18	Best Practices

McKinsey 7S	Research Subquestion	Questionnaire	Interview Protocol	Document Review
	developing a private-sector intelligence team?	a private-sector intelligence team?		
Style	SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?	Q7. What leadership approaches do you believe to be best suited to the growth and development of a private-sector intelligence team?	Items 19, 20	Job Descriptions, Standard Operating Procedures, Organizational Charts
Staff	SQ2: What type of human and other resources might be required to adequately address the business requirements levied upon this type of team?	Q2: How many people do you believe are necessary to adequately address the business requirements tasked to this type of team?	Items 3, 8, 11a	Job Descriptions
Skills	SQ1: What knowledge, skills, and abilities might need to be present on this type of team?	Q1: What background, knowledge, skills, and abilities do you believe should be present on a geopolitically-focused private-sector intelligence team?	Items 3a, 4, 8a	Job Descriptions

Interviews

The interview protocol was focused on understanding the global and organizational context in which the Global Company's intelligence team operated during a specific timeframe and how that context was addressed through strategy, organizational structure, internal operating systems, staff and skills development, leadership styles, and shared values. Fifteen former members of The Global Company's intelligence team were interviewed; interviewees were from all levels within the team including individual contributor (analyst and senior analyst), manager and senior manager, and executive (director) levels. Each interviewee was employed by The

Global Company's intelligence team at some point between 2005 and 2021. The data derived from the interviews, documents, and questionnaire were maintained in such a manner that an external, objective, independent researcher could replicate the study and/or conduct additional studies using the same dataset. In addition to the items included on the following interview protocol, which is in APPENDIX F, each participant was also requested to identify their professional level on the team and the general timeframe during which they were a member of the team for analysis purposes. As a part of the deidentification process, this information was disaggregated from the interviewees' pseudonyms.

1. During your time with the intelligence team, what did you see as the team's purpose?
    a. What were the team's primary responsibilities in light of this purpose?
2. During your time with the intelligence team, what were the core geopolitical/global issues that you (specifically) and the team (more broadly) were responsible for?
    a. What, if any, major geopolitical incidents occurred during your time with the team that altered the team's responsibilities?
3. What skills or competencies do you believe were most necessary for the team to employ?
    a. What, if any, gaps existed in skills or competencies during your time on the team?
4. What do you believe the team's reputation was within the company? What was it known for doing well, and what were its deficiencies?
5. During your time with the team, how, if at all, was the team's work monitored and assessed?
6. During your time with the team, how did the team receive its taskings, and how did it meet those requirements?

   a. How, if at all, was the team's strategy adjusted to account for evolving requirements?

7. In your experience, who were the primary consumers of the intel team's products?
   a. What value do you believe these stakeholders found in the team's products?

b. Which consumers, if any, do you believe should have been a part of the team's customer base that were not?

8. How well was the team resourced as far as financial, training, personnel, and/or vendor resources and skills to do the job?
   a. What, if any, opportunities existed for professional or skills development within the team?

9. During your time with the intelligence team, how was the team structured? What was the hierarchy both within the team and external to the team?
   a. What were the lines of communication (explicit and implicit) both within the team and with external stakeholders?

10. During your time with the intelligence team, what was the team's role within the broader company? How did the team and its responsibilities interact with those of other parts of the organization?

11. How, if at all, did the team members organize and align themselves (informally)?
   a. What positions or specializations were represented within the team?

12. Within the team did you perceive decision making to be centralized or decentralized?
   a. What do you perceive as the positives and negatives of this decision-making structure?

13. Who, if anyone, was responsible for decision making based on the information provided by the team?
14. What, if any, processes were associated with the day-to-day internal operations of the team, including tracking projects, coordination, etc.?
15. What, if any, were the main systems that ran the organization external to the team itself (e.g., HR policies regarding recruitment and promotion, information security policies, document storage and retention policies, communication standards with senior leadership, etc.)?
16. In your experience, what was the team culture? For example, did team members tend to be cooperative or competitive?
    a. How strongly do you believe team members adhered to these values?
    b. How did this impact the functioning of the team?
17. What was the corporate culture outside of the team?
18. What were the broader company's stated/fundamental values?
19. What leadership style(s) was/were employed during your time on the team?
    a. How effective do you believe this style of leadership was?
20. How, if at all, did leadership employ professional and/or skills development on the team?
    a. How, if at all, did leadership seek to devolve responsibility and decision making to lower levels?

Questionnaire

The researcher also employed a questionnaire which was deployed to professionals in the private sector intelligence field who are employed by geopolitically-focused intelligence teams

in a variety of private sector companies but who have not been employed on The Global Company's intelligence team, thus establishing two discrete populations. This questionnaire was based on the seven subquestions in order to explore the perceptions of members of the broader private sector intelligence field through a systems theory lens. The questionnaire contained ten questions modified from the interview items and was employed simultaneously with the collection and analysis of interview data and the analysis of key organizational documents. This questionnaire was used to: (a) triangulate the data obtained through the case study's interviews, (b) situate the case study in the broader private sector intelligence field, and (c) better understand the transferability of the experiences of the interviewees. The questionnaire, which is also included in APPENDIX G, is as follows.

- Q1. What skills or competencies do you believe are most necessary for a private sector intelligence team to employ?
- Q2. What is the size of your team?
- Q3. What positions or specializations are present on your team?
- Q4. How does your team receive its taskings?
- Q5. How does your team address intelligence requirements?
- Q6. How is your team structured?
- Q7. What processes or procedures are associated with the day-to-day internal operations of the team, including tracking projects, coordination, etc.?
- Q8. What values do you see employed by your team?
- Q9. How does your team's leadership employ professional and/or skills development on the team?

Additional data collected alongside answers to these questions included the number of years of professional work experience in the private sector intelligence field, the number of total years of professional experience in the intelligence field, and the categorization of work responsibility (e.g., individual contributor, manager, or executive) to compare perceptions on these elements at differing levels of seniority. To ensure that the respondents were a part of the target population, the researcher included definitions of geopolitics and private sector intelligence in the recruitment script; the questionnaire allowed for open-text responses to allow for coding. All responses were maintained in such a manner that an external, objective, independent researcher could replicate the study and/or conduct additional studies using the same data set.

Document Analysis

To triangulate the data collected through the interviews, the researcher also reviewed operational documents that describe the team's purpose and intent, its structure, its standard operating procedures (SOPs), its hiring criteria, and its overarching policies. These documents were specific to The Global Company's intelligence team and were dated between 2005 and 2021. These documents included: (a) job descriptions, which articulate the skill sets and experiences prioritized for new members of the team; (b) best practices documents, which detail the procedures and methodology employed by the team in conducting its work as well as the strategy employed to achieve its goals; and (c) detailed organizational charts, which identify the structure and areas of responsibility for each team member. These documents were not labeled or otherwise identified as confidential, though given the researcher's background, knowledge, and experience, they may have been granted access to documents that could be characterized as confidential. According to Richards and Morse (2013), triangulation is done by juxtaposing

analysis of different data types and methods to address the same broader questions. By viewing the overarching research question and subquestions from different perspectives via multiple data sources, a more robust picture can be developed. APPENDIX H documents the criteria used for selecting documents for review. APPENDIX I provides a list of the documents that were analyzed.

Validity and Reliability

According to Lincoln and Guba (1985), qualitative research is subjective, meaning that it relies heavily on perception; therefore, reliability and validity are positivist, rather than interpretivist, tools. Lincoln and Guba further contended that validity and reliability can be established through determining the credibility, authenticity, transferability, dependability, and confirmability of the study. Dependability and confirmability are thus established through a rigorous audit of the research process.

Validity

According to Creswell and Miller (2000), validity is defined as the accuracy, trustworthiness, and credibility of a study's findings from the perspective of the researcher, experts in the field, and consumers of the research. Richards and Morse (2013) contended that validity in research can be built through establishing alignment between the questions, data, and method and adequately accounting for and logging each decision and interpretation within the findings.

Prima Facie Validity. For this study, the interview protocol was created to explore, through a systems theory lens, how the intelligence team at one particular MNE has addressed evolving company requirements within different organizational and geostrategic contexts. To ensure that the interview items were a proper fit to the data and method, the researcher created

the interview protocol to explore the different elements included within the McKinsey 7S (Waterman et al., 1980) framework from each interviewee's perspective. Thus, the researcher provided prima facie validity (Creswell & Miller, 2000; Polit & Beck, 2010) of the instrument by ensuring the alignment of the interview protocol and research questions with the research purpose and problem statement. Similarly, the questionnaire was also created in alignment with the McKinsey 7S (Waterman et al., 1980) framework.

Peer Review Validity. Initial peer review validity of the research questions was conducted with the assistance of two of the principal investigator's colleagues who are experts within the private sector intelligence profession. These colleagues were asked to analyze the research questions, research design, interview protocol, and questionnaire. The researcher held a feedback session with these reviewers to discuss feedback on the instruments, and the comments and recommendations from these reviewers were incorporated into the interview protocol and questionnaire. All the agreed-upon changes were adopted into the protocol. Because validity entails asking the right questions, implementing a thorough review of the items by experts in the field assisted in validating the instruments. The interview protocol and questionnaire were also reviewed and approved by the IRB before any research was conducted.

Pilot Interviews. In addition, the instrument and interview process were piloted with the assistance of two individuals who are current private sector intelligence professionals but who were not included in the study due to their direct reporting relationship with the researcher. Their participation in pilot interviews was used to confirm the understandability of the interview items and the adequacy of the time set aside for the interviews. Input from the pilot interviews were also incorporated into the interview protocol.

Expert Review. Expert review was conducted by other professionals within the field in the lead-up to both the preliminary and final defenses, and expert recommendations were incorporated into the research instruments.

Triangulation. Three primary data sources—interview data, a questionnaire, and document analysis—were analyzed separately and then subsequently triangulated to improve validity. This triangulation allowed for the identification, review, and assessment of emerging themes from different perspectives; it also allowed the researcher to situate the data from the interviews and document analysis within the broader private sector intelligence field in order to provide a comprehensive understanding of the data collected.

Reliability

According to Richards and Morse (2013), a study is considered reliable if repeating the process under the same parameters would yield similar results. Similarly, instrument reliability depends on "the extent to which results are consistent over time and an accurate representation of the total population under study" (Joppe, 2000, p. 1) and replicability of those results by another researcher using the same methodology. As the field of private sector intelligence is relatively nascent, and the building and leveraging of these teams within multinational corporations lacks a standardized framework, there is the potential for a high degree of transferability of the study's findings to additional organizations and contexts beyond the reliability established through replication in its original context.

Further, in addition to the MAXQDA qualitative analysis software that the researcher employed, a second coder assisted in establishing intercoder reliability (ICR) and helped to ensure the researcher's reflexivity through challenging the researcher's thought processes and assumptions. Due to the size of the data set, the second coder was employed to code between

10%-25% of the data (O'Connor & Joffe, 2020) and ultimately coded 17% of the data. The second coder did not have access to the identities of the interviewees or questionnaire respondents but was familiar with the field of study and experienced in qualitative research.

Data Collection

Data collection commenced upon successful defense of the principal investigator's research proposal and approval by Pepperdine's IRB office. Data were collected through virtual, scheduled, one-hour semistructured interviews; through an open-text questionnaire deployed to multiple professional networking organizations within the private sector intelligence field; and through document analysis of selected operational documents associated with The Global Company's geopolitically-focused intelligence team.

Interviews

Open-ended interview items were used to obtain information on the perceptions of former employees associated with The Global Company's intelligence team. All interviews were conducted via video teleconference using a private access code. By conducting the interviews via private video teleconference, the participants were able to select a timing and venue with which they were most comfortable. The researcher was also able to record the interviews for future review with the consent of the interviewee. All subjects were known to the principal investigator through the principal investigator's professional network or professional affiliation with The Global Company. All participants were contacted through an introductory email and/or LinkedIn message detailing the purpose of the study and soliciting their participation. Participants were advised that their participation was completely voluntary and that their confidentiality was assured via assigned pseudonyms. Those who opted to participate then received a follow-up email with an overview of the interview process, a copy of the interview items, and a brief

explanation of the purpose of the IRB. An informed consent form was also attached to the follow-up email and was reviewed and signed electronically at the start of the video interview. Following the interview, the principal investigator made a copy of the interview transcript available to each participant, though all participants declined. At the end of each interview, the investigator also confirmed with the interviewee that they would be open to follow-up conversations as necessary to ensure the accurate interpretation of the participant's perspectives, though no follow-up or clarification was needed (Creswell & Poth, 2018).

The data collected through the interview items were focused on understanding the global and organizational context in which the team was operating at a specific time and how that context translated into the team's mission, and how that mission was addressed by strategy, organizational structure, internal operating systems, staff and skills development, leadership styles, and shared values. Interview items were open-ended and were supplemented, when necessary, by follow-up questions and neutral probes such as "please continue…" or "could you say more about that?" These probes were used to encourage participants to expand their answers without the principal investigator influencing their responses. Each of the interviews was audio-recorded and lasted for approximately one hour. Prior to initiating interviews, the researcher conducted multiple simulated interviews and pilot interviews to ensure that the interview items could be completed in the allotted time.

All participants were notified that they could withdraw from the study at any stage of the process, skip a question with which they were uncomfortable, or request that the researcher stop or pause the recording. This notification, in addition to the assurance of confidentiality, the informed consent form, the proper handling and disposition of interview recordings and memos,

and review by the IRB, served to mitigate against the minimal risk of exposure the participants may have had to human subject harm.

The principal investigator transcribed the data after each interview, paying particular attention to the themes arising from the participants' perceptions. The data were unstructured and included interview notes, researcher reflections, along with the interview transcription (Richards & Morse, 2013). After the completion of the interviews, the principal investigator followed up to thank the participants and provide a general timeframe for the completion of the study.

Questionnaire

A 10-question, open-text, questionnaire was used to obtain perceptions of geopolitically-focused private sector intelligence professionals regarding the various elements of building and leveraging intelligence teams within the private sector. The questionnaire was created using SurveyMonkey and was based on the seven subquestions. It was used with professionals outside of The Global Company to situate the case study in the broader private sector intelligence field and to triangulate the data obtained through the case study's interviews and document analysis. The questionnaire was distributed via the researcher's professional network, which includes LinkedIn; the Europe, Middle East, and Africa Analyst Roundtable; AIRIP; and the State Department's Overseas Security Advisory Council.

Within the initial posting and at the start of the questionnaire, respondents were advised that their participation was completely voluntary and that their anonymity was ensured, as no identifying data were collected. Those who opted to participate viewed a brief explanation of the purpose of the study and were presented with an electronic informed consent form. Upon acknowledgement of informed consent, respondents were then able to proceed with the questionnaire. The researcher's contact information was provided at the beginning of the

questionnaire for respondents interested in further information on the study or in viewing research results. To ensure that respondents were a part of the target population, the researcher included definitions of geopolitics and private sector intelligence in the recruitment script (APPENDIX J); respondents proceeded with the questionnaire based on self-identification with these definitions. The questionnaire allowed for open-text responses from respondents for coding. All the responses were maintained in such a manner that an external, objective, independent researcher could replicate the study and/or conduct additional studies using the same data set.

Because the purpose of the questionnaire was to triangulate the data acquired from interviews of former employees of The Global Company, follow-on interviews with respondents were not pursued for this study, and thus, no identifying data were collected or required. All respondents were notified that they could, at any stage of the questionnaire, withdraw their participation or skip a question with which they were uncomfortable. This step, in addition to the informed consent form, the assurance of anonymity, the proper handling and disposition of collected data, and review by the IRB, served to mitigate against the minimal exposure the participants may have had to any human subject harm. The principal investigator has coded the questionnaire responses, paying particular attention to the themes from the respondents' perceptions.

Document Analysis

Data were also collected through operational documents that described the purpose and intent, structure, standard operating procedures (SOPs), hiring criteria, and overarching policies of The Global Company's intelligence team. These documents were specific to The Global Company's intelligence team and were dated between 2005 and 2021. These documents

included: (a) job descriptions, which articulate the skill sets and level of experience that are considered a priority for new members of the team; (b) best practices documents, which detail the procedures and methodology employed by the team in conducting its work, as well as the strategy employed to achieve its goals; and (c) detailed organizational charts, which identify the structure and areas of responsibility for each team member. The principal investigator coded these documents based on key words and themes, including the categories identified within the McKinsey 7S framework as well as separate, emergent themes. The investigator also employed MAXQDA for document analysis to further assess alignment with the data acquired during interviews and to identify any divergent concepts.

Data Management

Although the interviews took place via video, recordings were audio only, and the interviews were recorded only with the consent of the participants; one participant did request not to be recorded to avoid their perceptions being tied to their identity, and as such, the researcher used interview notes to document the interviewee's perspectives. Two other interviewees requested that the researcher pause recording at certain points during their interviews so that they would feel comfortable to speak more freely about their experiences, but allowed the researcher to resume recording after a brief anecdote. The audio recordings were used to ensure the accuracy of subsequent data analysis and do not identify the participant by name. De-identified transcripts of the interviews will be saved securely for three years for potential further analysis. Upon transcription and analysis of emerging themes, the audio recordings were destroyed.

All data and documents were secured on the principal investigator's password-protected and encrypted laptop computer and backed up to a password-protected, encrypted cloud drive.

All cloud folders have been and will be used only for this research project and will be deleted within three years of the study's completion. No paper notes, files, or worksheets have been maintained.

Data Analysis

The researcher used a systems theory framework to code emergent themes and ideas to aid in addressing the overarching research question in this study to understand the extent to which systems theory informs the building and leveraging of intelligence teams in the private sector. The qualitative software analysis tool MAXQDA enabled the researcher to collect and analyze data using a series of analytics and data visualization tools that allowed for tracking the progression of an interview, coding, connection tracking, and document comparison, all while ensuring that outputs remained directly linked to the underlying data. This platform thus allowed for both macro and microanalysis. MAXQDA has a built-in tool for professional transcriptions of audio and video recordings. As such, with the consent of the interviewee, audio recordings were done via voice recordings on the researcher’s Apple iPhone and then subsequently imported to the program for qualitative analysis of the recorded content and identification of common themes and key words that fit within the associated systems theory framework. Similarly, the MAXQDA tool was leveraged to identify and track common themes throughout the coding of the questionnaire responses and the document analysis.

Chapter Summary

Chapter 3 provided an overview of the qualitative case study methodology used for this study, which was approached from a social constructivist worldview using semistructured interviews for data collection, in addition to a questionnaire and document analysis. This methodology aligned well with the purpose of the study, which used participant perceptions to

explain the interconnected nature of the components involved in building and leveraging geopolitically-focused intelligence teams in U.S.-based private sector multinational enterprises. This chapter also addressed the data collection and analysis procedures, as well as the protocols used to conduct this study to address challenges associated with validity and reliability in qualitative studies. It also highlighted how the researcher sought to adhere to the IRB's requirements and articulated the human subject considerations employed throughout the study.

Chapter 4: Presentation of Findings

Chapter Overview

In this chapter, the data are presented in table format with further evaluation and interpretation addressed in Chapter 5. The headings in this chapter are organized first by method (interviews, questionnaire responses, and document analysis) and then by subquestion. The headings for this chapter are: Chapter Overview, Introduction, Setting and Sample, Textual Coding for Interviews, Presentation of Key Findings for Interviews, Textual Coding for Questionnaire, Presentation of Key Findings for Questionnaire, Textual Coding for Document Analysis, Presentation of Key Findings for Document Analysis, and Chapter Summary.

Context

The purpose of this case study was to explain, using a systems theory lens, the interdependence of the components involved in building and leveraging geopolitically-focused intelligence teams in U.S.-based private sector MNEs. The central research question guiding this inquiry was: How, if at all, does systems theory explain how geopolitically-focused intelligence teams operate in the private sector? Seven subquestions were used in the collection and analysis of interview data and in the analysis of questionnaire responses and document analysis. These seven subquestions were:

- SQ1: What knowledge, skills, and abilities might need to be present on this type of team?
- SQ2: What type of human and other resources might be required to adequately address the business requirements levied upon this type of team?
- SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?

- SQ4: What considerations could be taken into account when developing a private-sector intelligence team's structure?
- SQ5: What systems or processes could be put in place to best leverage a private-sector intelligence team?
- SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?
- SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?

Based on feedback on the interview protocol from pilot interviews, two modifications were made to the study. First, item 19, which dealt with the leadership style(s) each interviewee saw employed on the team, was rephrased to more broadly address different leadership styles that may have been employed beyond participative leadership. The revised and final interview protocol is included in APPENDIX F. Second, it was recognized that subquestion 2, which was originally phrased to narrowly focus on the number of personnel needed for these teams to address the business requirements levied upon them, did not consider the multitude of force-multipliers that these teams often avail themselves of, including vendor support, professional networks, and cross-functional collaboration. As such, the question has been revised to account for additional considerations beyond headcount. These additional considerations were found to directly influence or augment headcount on these teams, and as such, these responses were also included in the results for SQ2.

Terminology

Throughout the presentation of findings and subsequent Chapter 5 discussion of findings, the researcher references anchor codes, subcodes, themes, meaningful statements, and

quotations. Anchor codes are used to refer to the McKinsey 7S elements of staff, skills, structure, strategy, shared values, systems, and leadership styles, which formed the systems theory framework used in this study. These anchor codes set the high-level topics for each of the subquestions and thus informed the interview protocol, qualitative questionnaire, and document analysis. Through coding, themes emerged within each of these anchor codes that helped to define what each anchor code entailed. These themes were then grouped together where similarities were found and coded within each anchor code, becoming subcodes. All interview transcripts, questionnaire responses, and documents were coded in their entirety, though the researcher identified meaningful statements within each that clearly defined what was meant by each theme or subcode, and quotations from these meaningful statements were used to illustrate and define the concepts.

Interviews

Based on these subquestions, an interview protocol consisting of 20 semistructured items was developed, and 15 audio-recorded video interviews were conducted with individuals who had previously been a part of The Global Company's geopolitically-focused intelligence team. The participants were assigned pseudonyms to maintain confidentiality, and each pseudonym was further obfuscated through use of the pseudonym's initials. These initials were used for identification and reference throughout this chapter and in Chapter 5. Because this study took place during a global pandemic, and at a time when the private sector intelligence field was in its nascency, and because perspectives may shift over time, the timing of interviews has been documented in Table 2 for context; the breakdown of participants in terms of their level or role on the team is addressed in Table 3.

Procedure

The interviews were conducted via Zoom video conferencing and were audio recorded using the researcher's Apple iPhone with the consent of the participants. One participant requested that their interview not be recorded, and as such, there is no verbatim transcription of the interview; for this interview, the researcher relied on interview notes to capture direct quotations and relevant themes for coding purposes. Otter.ai was used to transcribe the recorded interviews, and MAXQDA qualitative analysis software was utilized for coding purposes. The 15 interviews resulted in 733 minutes of interview content, with the average interview lasting 52 minutes. This resulted in 260 pages of single-spaced, timestamped, 12-point font interview transcripts. After the transcripts were created, the automated transcripts were manually edited for accuracy while listening to the recorded interview. The edited transcripts were subsequently uploaded to the MAXQDA software.

Table 2

Interview Schedule

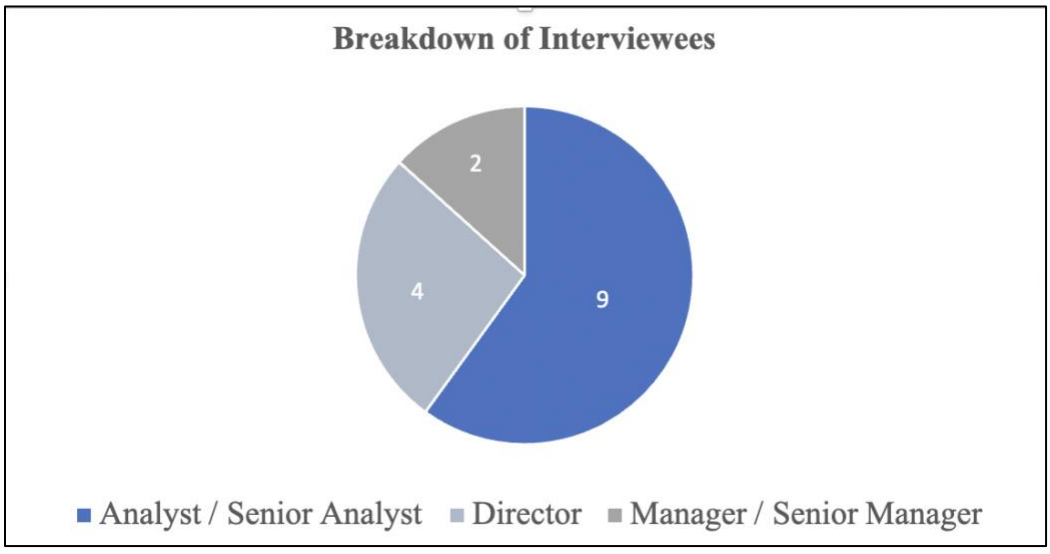
Interviewee	Date
IM	Wednesday, September 1, 2021
BW	Tuesday, September 14, 2021
SW	Sunday, September 26, 2021
CM	Monday, September 27, 2021
JF	Friday, October 1, 2021
CA	Friday, October 15, 2021
AM	Sunday, October 17, 2021
LO	Thursday, October 21, 2021
GZ	Monday, October 25, 2021
BP	Wednesday, October 27, 2021
PQ	Monday, November 1, 2021
DS	Tuesday, November 2, 2021
GS	Thursday, November 4, 2021
HU	Thursday, November 4, 2021
SL	Friday, November 5, 2021

Profiles

As noted in the Figure 3 breakdown of the professional level for each participant, of the 15 participants, two were at the manager level, four were at the director level, and nine were at the analyst or senior analyst level. This is aligned with the overall number and breakdown of the historical members on the team, as the researcher was able to identify a total of three former managers or senior managers, four former directors, and 11 former analysts or senior analysts. As such, for the period studied, and based on the limitations that interviewees be former members of the team, the participants represented 100% of the former directors, 67% of the former managers or senior managers, and 81% of the former analysts or senior analysts. Overall, 15 of the 18 identified former members of the team were interviewed. In the interview process, 60% of those interviewed were at the analyst or senior analyst level, 13% were at the manager or senior manager level, and 27% were at the director level. In the total population, 22% of former employees were at the director level; 27% were at the manager or senior manager level, and 61% were at the analyst or senior analyst level.

Figure 3

Interview Participant Breakdown



Textual Coding for Interview Items

In building meaning out of research data, Creswell (2014) identified seven levels in data analysis and validation, each of which build on the previous level. These levels begin with the raw data, moving through organization, reading, coding, identifying themes and descriptions associated with each code, interrelating the themes and descriptions, and then developing or interpreting the meaning of these themes and descriptions. Of the last three elements of this framework—identifying themes and descriptions, interrelating the themes and descriptions, and developing or interpreting the meaning of these themes and descriptions—the first two are the focus of Chapter 4, and the last appears in Chapter 5.

According to Saldaña (2013), in qualitative inquiry, coding is "most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data" (p. 3). According to Charmaz (2001), coding is the critical link between the data and its meaning. However, Sipe and Ghiso (2004) noted that coding is fundamentally a "judgment call" due to its subjective nature and the predisposition of researchers (p. 8).

The first step in coding and analyzing the data from the 15 interviewees consisted of categorizing the content from each of the 20 items on the interview protocol within the McKinsey 7S framework to consolidate meaning for categories with aligned characteristics (Grbich, 2007; Saldaña, 2013). In this manner, the researcher precoded the data (Auerbach & Silverstein, 2003; Layder, 1998), using the elements of the McKinsey 7S framework as anchor codes and used quotations from the interview participants to aid in refining these categories (Boyatzis, 1998). The transcripts were broken down by interview question, each of which were targeted at a specific element of McKinsey 7S, allowing the researcher to review each question

as a discrete unit. Each response was then broken up by theme, meaning that if a respondent addressed one theme in their response and later returned to the same theme, each time the theme was mentioned it was coded separately, thereby adding weight to the emergent theme based on the perspective of the interviewee. Because each question was designed to target individual elements of McKinsey 7S, there were seven primary or anchor codes, each of which included multiple themes or subcodes. There was a total of 57 themes derived from the data. In total, the interview transcripts yielded 843 coded segments of data.

In this step, an additional coder, who was familiar with the private sector intelligence field, assisted in establishing intercoder reliability through reviewing both the established and the emergent themes and subcodes for consistency. For example, some themes, such as collaboration, arose as both systems (how the work is accomplished) and a shared value. In these situations, the definitions of the various emergent themes were debated to determine which themes shared enough commonality in their professional application and could be merged and which were truly distinct. Given these challenges, interrater review was instrumental in code collapsing, and the codebook was revised and refined multiple times to ensure a tight definition and clear examples for each code. The additional coder separately coded the three different elements of the study, providing review of the interview data, addressing the documents, and coding the questionnaire. In total, the additional coder separately coded a total of 17% of the data collected for each element and thus a total of 17% of the overall data. Key adjustments made for the interview subcodes because of interrater review to achieve 90% alignment included the following.

1. For IQs 1, 2, 5, and 6, themes related to strategy, including “resourcefulness,” “adaptability,” and “flexibility,” were combined.

2. For IQs 1, 2, 5, and 6, themes related to strategy, including “independence,” “impartiality” and “credibility,” were combined.
3. For IQs 1, 2, 5, and 6, themes related to strategy, including “driving business growth and operations” were combined with concepts tied to crafting “actionable” information and identifying or developing opportunities.
4. For IQs 8 and 11a, themes related to staff, such as “regional and cultural experience,” were combined with “background and education.”
5. For IQs 8 and 11a, themes related to staff, such as vendor resources, were combined with budget, though a new code was established related to “travel opportunities.”
6. For IQs 3, 4, and 8a, themes related to skills, such as business acumen and “understanding the business,” were combined.
7. For IQs 3, 4, and 8a, themes related to skills, such as “relationship building” and “networking,” were combined.
8. For IQs 3, 4, and 8a, themes related to skills, such as “synthesizing and contextualizing data,” “organizational skills and detail oriented,” “resourcefulness and research skills,” and “critical thinking,” were combined under the broader theme of “analytic skills.”
9. For IQs 7, 9a, 13, 14, and 15, themes related to systems, such as “direct sharing with decision makers” and “requests from executives,” were combined.
10. For IQs 7, 9a, 13, 14, and 15, themes related to systems, such as “collaboration” and “cross-functional teams,” were combined.
11. For IQs 9, 10, and 11, themes related to structure, such as “stovepiped or siloed,” were combined with concepts related to territoriality.

12. For IQs 16, 17, and 18, themes related to shared values, such as “proactive,” were combined with “self-motivated.”
13. For IQs 16, 17, and 18, themes related to shared values, such as “teamwork” and “shared responsibility,” were combined with “collaboration.”
14. For IQs 16, 17, and 18, themes related to shared values, such as “psychological safety,” were combined with “positive work environment.”
15. For IQs 16, 17, and 18, themes related to shared values, such as “going above and beyond,” “quality,” and “excellence,” were combined.
16. For IQs 12, 19, and 20, themes related to “styles,” such as “participative leadership,” “decentralized decision making,” “democratic leadership,” and “team orientation,” were combined.

The researcher then identified meaningful statements in the transcripts which depicted themes that arose from within each element of the McKinsey 7S framework and used the coded software to highlight and code them to establish units of meaning and cluster themes. These quotations depicted the meaningful statements which were used to establish a codebook within the MAXQDA software, building definitions for and refining each unit of meaning. As the researcher coded the transcripts, the coding software tracked the frequency of themes while ensuring that the outputs remained directly linked to the underlying data, thus permitting both macro and microanalysis.

Through clustering and grouping the themes, both a textual and a structural description of each element of systems theory as seen in the McKinsey 7S framework was created, as it applied to building and leveraging intelligence teams in private sector MNEs. Because this inquiry was informed by systems theory, the elements of the McKinsey 7S systems theory framework

established the initial set of anchor codes for this study, resulting in directed content analysis. However, within each anchor code, themes emerged that helped describe the experiences and perceptions of participants. Table 3 documents the number of subcodes that fell under each parent or anchor code, based on the McKinsey 7S framework, in addition to the total number of subcodes for each anchor.

Table 3

Anchor Codes, Subcodes, and Total Code Count for Interviews

Anchor Code	Number of subcodes	Number of total codes
Staff	5	120
Skills	10	376
Structure	5	80
Strategy	9	167
Systems	9	222
Styles	10	120
Shared Values	9	163

Tables 4–10 detail the coding for all interview items (IQ1 through IQ20). Each table shows a subquestion mapped onto an anchor code. Within the table, interview items are aligned with themes arising from the coding process.

Table 4

Subquestion 1

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
Skills	3a	What skills or competencies do you believe were most necessary for the team to employ? What, if any, gaps existed in skills or competencies during your time on the team?	Analytic skills / critical thinking - 99 Relationship-building / networking - 62 Effective communication skills - 58 Subject matter expertise - 56 Business acumen - 40
	4	What do you believe the team's reputation was within the company? What was it known for doing well, and what were its deficiencies?	

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
	8a	What, if any, opportunities existed for professional or skills development within the team?	Intellectual curiosity - 21 Program management - 21 Leadership / mentoring - 10 Language skills - 5 Resilience / patience - 3

Table 5

Subquestion 2

SQ2: What type of human and other resources might be required to adequately address business requirements levied upon this type of team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
Staff	3	What skills or competencies do you believe were most necessary for the team to employ? What, if any, gaps existed in skills or competencies during your time on the team?	Vendor resources - 56 Value / existence of team unknown - 26 Regional/cultural experience; educational background - 16 Travel opportunities - 11 Individual bandwidth / Headcount - 11
	8	How well was the team resourced as far as financial, training, personnel, and/or vendor resources and skills to do the job?	
	11a	What positions or specializations were represented within the team?	

Table 6

Subquestion 3

SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
Strategy	1	During your time with the intelligence team, what did you see as the team's purpose? What were the team's primary responsibilities in light of this purpose?	Customer / business-alignment - 53 Decision-making support - 31

SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
	2	During your time with the intelligence team, what were the core geopolitical/global issues that you (specifically) and the team (more broadly) were responsible for? What, if any, major geopolitical incidents occurred during your time with the team that altered the team's responsibilities?	Resourcefulness / flexibility - 21 Drive business decisions / actionable - 16 Identify mitigation measures - 12 Independence / credibility - 11 No discernible strategy - 10 Tripwire / warning mechanism - 8 Cost-savings - 3
	5	During your time with the team, how, if at all, was the team's work monitored and assessed?	
	6	How, if at all, was the team's strategy adjusted to account for evolving requirements?	
	8	How well was the team resourced as far as financial, training, personnel, and/or vendor resources and skills to do the job? What, if any, opportunities existed for professional or skills development within the team?	

Table 7

Subquestion 4

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
Structure	9	During your time with the intelligence team, how was the team structured? What was the hierarchy both within the team and external to the team? a. What were the lines of communication (explicit and implicit) both within the team and with external stakeholders?	Team is a flat structure within a hierarchical organization - 35 Team organized geographically - 15 Exists in stovepipe/siloed structure - 11 No defined career path for team - 10 Cross-functional teams / Alternative structures - 5
	10	During your time with the intelligence team, what was the team’s role within the broader company? How did the team and its responsibilities interact with those of other parts of the organization?	

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
	11	How, if at all, did the team members organize and align themselves (informally)?	

Table 8

Subquestion 5

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
Systems	7	In your experience, who were the primary consumers of the intel team's products?	Direct sharing with decision makers - 67 Peer Review / collaboration - 35 Self-generated / ad hoc or informal - 33 Project-tracking - 22 Storage or repository for products - 22 Customer feedback - 22 Informal / limited focus on process - 12 Team meetings / leadership check-ins - 4
	9a	What were the lines of communication (explicit and implicit) both within the team and with external stakeholders?	
	13	Who, if anyone, was responsible for decision making based on the information provided by the team?	
	14	What, if any, processes were associated with the day-to-day internal operations of the team, including tracking projects, coordination, etc.?	
	15	What, if any, were the main systems that ran the organization external to the team itself (i.e., HR policies regarding recruitment and promotion, information security policies, document storage and retention policies, communication standards with senior leadership, etc.)?	

Table 9

Subquestion 6

SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
Shared Values	16	In your experience, what was the team culture?	Teamwork / collaboration - 49 Responsive / customer-focused - 44 Creativity / innovation - 22 Proactive / self-motivated - 15 Going above and beyond - 9 Dedication to the job - 6 Having fun / humor - 4 Positive work environment - 4
	17	What was the corporate culture outside of the team?	
	18	What were the broader company's stated/fundamental values?	

Table 10

Subquestion 7

SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
Styles	12	Within the team did you perceive decision making to be centralized or decentralized? What do you perceive as the positives and negatives of this decision-making structure?	Autonomy-supportive leadership - 34 Participative leadership - 29 Centralized decision making - 20 Changes in leadership - 10 Creating opportunities for subordinates - 7 Situational / adaptable leadership - 6 Mentoring / providing guidance - 4 Take-charge / leverages
	19	What leadership styles were employed during your time on the team? How effective do you believe this management style was?	
	20	How, if at all, did leadership employ professional and/or skills development on the team? How, if at all, did leadership seek to devolve responsibility and decision making to lower levels?	

SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?			
Anchor Code	Interview Item #	Item	Occurrence of Themes
			own expertise - 4 Nurturing / protecting - 2 Change leader - 1

Selected Quotations: Horizontalization of Interviews

According to Moustakas (2011), one of the first steps in the data analysis process is horizontalization, wherein specific, meaningful statements that provide insight into participants' experiences are identified. Moustakas (2011) described these statements as horizons or "the grounding or condition of the phenomenon that gives it a distinct character" (p. 95). Horizontalization treats every statement as significant and possessing equal value, making it relevant to providing textual meaning for this case study. Quotations for each element of the McKinsey 7S framework are outlined in Tables 11–17, describing the themes that arose within these anchor codes throughout the interviews.

Table 11

Interview Quotations: Skills

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?		
Anchor Code	Theme	Quotation
Skills	Analytic Skills / Critical Thinking	"analytical skills, I feel like that's pretty vague, but just kind of understanding how to take all the different pieces of what you're seeing and formulate it into…a coherent outlook, and forecast, so that the decision maker … understands." (BW)
	Relationship-building / Networking	"…relationship building. So, you know, one of the ways that private sector intelligence, maybe differs from public sector intelligence is that we have very direct relationships with our internal clients. So it's very important to know them very well - to know what makes them tick." (GZ)

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?

Anchor Code	Theme	Quotation
		"Relationships can't be 'scaled' - like you can introduce people, but the level of relationship - the depth - can't be replicated or transferred. So, relationships are important. But, and I want to just go back to my [previous] culture when bullets are flying. I want them to call for air support, not what guys thinks he knows how to do air support." (CA)
	Effective Communication Skills	"I think you have to be able to communicate effectively with business leaders; your audience is generally not going to be the…security team […] We expanded it and became indispensable to businesses […] to grow that business […] The ability to communicate effectively is even more important and with a company like [The Global Company], you have to be able to communicate effectively, often with folks whose first language is not English. So, you know, in the intelligence world as analysts, they teach us okay, don't use jargon. Be clear. You know, spell out your first acronym. You have to take that to a whole 'nother level when you're talking to people who don't, understand English as their first language, and you have to do your best to be - I don't want to say simplistic - but very clear, in order to get your point across and then with the business leaders. It's typical Intel analysts one on one you have to understand what those executives' agendas are, and anticipate their questions. And I think I think all of that makes you more valuable […], especially that communication piece, yeah, critical because you only have - it's like elevator speech every day. I've got five minutes to discuss with [an executive] why [something] is important, right?" (SL) "Write precisely what you want to say. Be concise, be clear. don't ramble, you know, and always what you're trying to float - what you're trying to convey, always put that is like, in the main part of the report, right? Because the second thing that I've learned, and you know, this is that people don't read. They don't read reports. So, you have to be very good at writing, you know, very good at conveying what you're trying to say, but using as little words as possible, and having it all fit in one page, which is tough. It's tough. So those are the two things that was the one thing I've learned is how to write well, I think that's for any corporate company that is standing up an intel team. Writing skills should be… paramount. Like it should be the number one skill that everyone should need." (BP)

Table 12

Interview Quotations: Staff

SQ2: What type of human and other resources might be required to adequately address business requirements levied upon this type of team?		
Anchor Code	Theme	Quotation
Staff	Vendor Resources	"In terms of vendors, I thought we had like a pretty good bucket of money to spend on vendors. So, I was…pretty happy to the point where it was almost like, we're turning away all these vendors that were like flying in at us. And so, I was like, pretty happy with that, to have these options. And it was really nice. It was to the point where like, everyone had their favorite vendors, and a lot of them were really different. And I don't think a lot of Intel teams have that luxury of like, having their go-tos. I think for some, they probably just have one or two. And, you know, we all had our go to list. And I thought that was great." (CM)
	Existence or Value of Team Unknown or Unclear	"None of our customers [knew] what we [did], no matter how well you educate them, no matter how close you work with them." (HU) "I think that sometimes people don't quite understand what the scope of the team is, across the company, or people don't really understand what that that really means, you know?" (IM) "Yeah, we had to knock down doors and force people to take Intel, and that just blew my mind." (CA) "Other than I don't even want to say bragging rights. You know, I don't know if [senior leadership] shared. I don't know who [they] shared with, you know, again, if you know I've been forcing your or, you know, [the VP] had more context, [they] should have been developing you know, the business leads…to be out you know, oh, you know, how to market, what do you need to know.[…] We talked about, you know, looking at, you know […] all sorts of things that would be more impactful to the business and […] we tried to talk to people and they again said, sort of 'talk to the hand, I can't tell you anything we do.' So then, you know, then we were willing to help all sorts of people. You know, I'm like, we've got incredible capabilities here. And they're

SQ2: What type of human and other resources might be required to adequately address business requirements levied upon this type of team?		
Anchor Code	Theme	Quotation
		like, 'No, we don't need you.' Right. So, we were trying to be sort of an answer in search of a question." (GS)
	Regional or Cultural Experience	"I felt like I was given that freedom to, like […] brief the situation […] or even make recommendations based on like my experience prior to [The Global Company]." (CM)

Table 13

Interview Quotations: Strategy

SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?		
Anchor Code	Theme	Quotation
Strategy	Customer or Business-Alignment	"I think our strategy changed less with requirements and more with leadership and leadership's understanding of what the requirements were. So, I don't think the requirements changed; I just think the understanding of them did. So just to just sort of nuance. I don't think there was much external forces, all kinds of internal stuff. And I think the original strategy air quotes is, was much more focused on long term strategic things and things that like didn't even necessarily, necessarily connect to our countries we're operating in but they were like strategic geopolitical things that would occur that potentially could have like secondary or tertiary implications for us. Then, as a new leadership, we started really zone focusing in on and honing in on what the business needed, whether it's tactical whether it's strategic really didn't matter as long as they needed it and we were, it was intelligence related we were well suited to do it because we would do it. And we had enough capacity so we rarely had to prioritize." (GZ)
	Decision-making Support	"Well, again, you know, it goes back to what was the main responsibility, I mean me we were there to really inform our business leaders on those decisions, whether it was a strategic decision or whether it was a tactical decision." (BP)

SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?		
Anchor Code	Theme	Quotation
		"We were thought partners, we were strategic advisors to give them our […] qualitative insights on the security situation…" (GZ)
	Resourcefulness / Flexibility	"[…] I always knew that we had to, like, go with the flow and roll with the punches. So, so saying that we continue to do that experiment, like an … evolution of our strategy is more than a continuation of it, because we've always had that outlook, that like, you know, this is not within our scope, but we're gonna do anyway, we've always had, like, a lot of it. I think a lot of it has to do to that. There were people in our team who've been there before, they're even like follow processes. So, they understood like, […] how things have been in the past. So, the fact that like, things continue changing, it's one of those things like the more things change, the more things stay the same. So at least at the time I was there, I haven't seen a major like turning point where we had to like change strategies. It's more like, yeah, things will always keep changing. And we're just going to keep changing with it. And if we don't, like it's going to really suck." (CM)

Table 14

Interview Quotations: Structure

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?		
Anchor Code	Theme	Quotation
Structure	Flat Structure Within a Hierarchical Organization	"We had too many layers when we started really." (GS) "So, it is a hierarchy there, but […] if you, if you ask me for the hierarchy that matters, it is the flat, fast, and precise organization of the [intelligence] team itself internally." (CA) "It was less hierarchical and more flat…to the extent that you can keep it open, collaborative, collegial...you're going to get a better product [that includes] everybody's perspective…" I did not make

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?		
Anchor Code	Theme	Quotation
		a clear, hierarchal distinction between senior analyst and junior analyst, like who has the knowledge, who has the experience and who has the talent, and I expected them to interact as peers, regardless of title." (AM)
	Organized by Geographic Region	"I would say our regional breakdown, you know, kind of regional alignments, and then specializations." (BW)
	Stovepipes or Silos	"It was a…it was an error to be kind of more protective of [the intel team]. As I've seen, kind of as I've moved on and done this and other companies. It doesn't have to be the CEO, but at a minimum, it should be the CEO's direct reports. I've seen it work with the board of directors. I don't think that that would have worked at [The Global Company]. But I do think kind of C-suite that they should have been customers, and I don't think they were there was a filter between us and them, and that, I think, was an error." (HU)

Table 15

Interview Quotations: Systems

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?		
Anchor Code	Theme	Quotation
Systems	Direct Sharing with Decision Makers	"So executive leadership within [security] would request things, and we were you know, we're there to kind of make them smart about things so that they can go and talk to leadership." (HU)
	Peer Review / Collaboration	"We did have a review process where generally at least one person was reviewing our work. And so that person was either a manager or director. And oftentimes, we (the other analysts) would actually review each other's work first. We might even review each other's emails, because communication was really really really important and we always wanted to make sure that we were being really

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?		
Anchor Code	Theme	Quotation
		mindful of that. So, at a minimum, a manager or director would review it and monitor it; generally speaking, though, it would actually be a co-worker just as a nice thing to do to get feedback before it went to the manager and the director. And then in terms of like, so that was like the official oversight process, then we communicated widely so everybody we sent all of our security partners and all of our lines of business partners would read it as well. I don't consider that monitoring our work, if that makes sense but they were they, they certainly had eyes on it; generally did not go above the director level for approval, a few a few times I wrote a big, like sort of forecasting pieces and it would go to our VP, but for day-to-day stuff regular reports it would definitely be director and then longer term like things we invested a lot of time and it would go to a VP." (GZ)
	Self-generated / ad hoc / informal	"Major taskings. Like if [the Director] got a question from somebody, [they] would go straight to the analyst for that particular region. But for the most part, it was really up to the discretion of each analyst. Plus, for example, me, you know…I'm looking at my region, and I'm reading all these reports and reading OSAC and reading news feeds, and if I saw something that caught my eye and thought, that might be something that could be of interest, and I would write report on my own, maybe send it to [the Director]. And see, get [their] thoughts. But for the most part, it really was the analyst themselves, they kind of were left to those tasks, things like tasking, you know, determining what was important what needed to be reported out." (BP)

Table 16

Interview Quotations: Shared Values

SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?		
Anchor Code	Theme	Quotation
Shared Values	Teamwork / Collaboration	"[The team was] 100% cooperative. I never once heard from one person I never heard a problem. We were all […] cooperative. We were able, they were all willing to help each

SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?		
Anchor Code	Theme	Quotation
		other. It was never about like, how do you know how do I show myself above the rest of my team? It was always how, you know, we were all looking after each other. If we needed help with a particular issue, we were always there for each other. So yeah, very much but I loved that respect. We were super cooperative. And that's the way it should be. We should all be able to, you know, talk among ourselves and help each other and be able to critique each other or also support each other." (BP) "So, I will tell you one of the greatest things I've experienced is the fact that everybody in [the intelligence team] said hey how can I help if something went down, someone had a medical appointment or something, you know, overwhelmed, everyone stepped up say hey what can we do for you so I thought that was phenomenal. It goes to show a cohesive and a culture of, of wanting to help and improve, and take care of each other, which is fun, once again, is where I came from the army is, hey, we are a rising tide floats all boats we all succeed, we all succeed together I think that was awesome." (CA)
	Responsive / Customer-focused	"We were known to know our stuff. There wasn't a question that somebody came to us with, that we weren't able to answer and to do so in a way that I think was quick, quick in terms of how quickly we respond, but also in terms of it delivered in a way that people really understood. I think we kind of got to be seen as geopolitical risk experts, which isn't necessarily the case. I mean, we were just really good at research and analysis […] If you if you have kind of a singular reviewer and communicator, then that can be really good. However, those relationships that really drive the success of the team begin to wither. If you're not putting your analysts and at the time, I wasn't an analyst. But if you're not putting your analysts in front of the customers, then they don't get to experience the back and forth and the questions that you know the challenges and they don't get to learn about the customer." (HU)
	Creativity / Innovation	"So, I think [sharing resources] led to innovation - led to collaboration, and it led to the practice and tradecraft of intelligence impacting the business in ways that were nontraditional. And are non-traditional." (SL)

Table 17

Interview Quotations: Styles

SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?		
Anchor Code	Theme	Quotation
Styles	Autonomy-supportive Leadership	"Yeah, so it was relatively quick, which I think was good, it empowered us – like we were doing our analysis I was like, I just felt like I could do my analysis and share with my leader, and they would give me … good feedback and, you know, just get it out. So yeah, I felt it was efficient. I think it was appropriate for the size of our team, it would have been inefficient if we were going above the director level to like the VP, that would make no sense or the SVP, which actually in some organizations very well could happen – that didn't happen with us and so I think it was appropriate; it was it was the right level of both quality and velocity, that was needed to do good work." (GZ) "At the analyst level, […] like, when we were writing assessments, and we made the decision of like, what angle to take and like, what information to include. And so then, so if you're with like, the analytical meat, of like an assessment and a briefing. So, you know, we had like a lot of say in that, um, but I think that was like a standard, I guess." (BW) "…it's not like, our manager and our director had to approve of the decisions we're making in terms of like, especially for risk assessments and what we wanted to say in it. Like it didn't have to be approved. Which was really nice. We were given a lot of autonomy, and a lot of trust as subject matter experts to say, well – what to say, based on our research, which was like the best part of it, that autonomy." (CM)
	Participative Leadership	"[The director] was very participative. You know, [the director] would check on us pretty much every day. We'd have meetings all the time. And, [the director] knew … exactly what every analyst was working on, because they were having conversations with us and we were asking [them] questions […] and I wouldn't say it was micromanaging. Because it's not micromanaging. It's actually knowing what your team was doing, and I think

SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?		
Anchor Code	Theme	Quotation
		that's huge, because then [they] could, you know, pass that along to [their] leadership […] not just talk about it in broad strokes that be very specific." (BP)
	Centralization of Decision making	"I think for like, big decisions, it was definitely very centralized, like, pretty much like, it was, like, the director and above, sometimes, like the manager and above too, but there was, I think, opportunities for us to chime in, on decisions, but I guess it depends, like, what kind of a decision it was. I felt like sometimes we were excluded from conversations with other teams. And kind of like the higher level, and not really like understanding why they needed something done a certain way. So I was, I would say, it's like, it was a mix. I definitely remember there were a few instances where a decision was made that nobody really on the team, like knew about and had any insight to, and that was bad." (BW) "[Decision-making styles] varied a lot. And I think, you know, when [one director] was in charge, it was very much their team. And then [after they left], it was a little bit of just anarchy. So, I guess decentralized in in that case? So having, I'm not sure there was better, one way or another, I think, I think [the director] did a good job of shielding the team from decisions that might be distracting to the team's day to day functionality, like [they] would just handle that. But sometimes there was there was a bit of the well, I, you know, I was dictatorial is not the right word, because [they] actually did a really good job of making people feel like they're a part of something important. But it was pretty much [their] team. And then after that, it was kind of nobody's team for a while. And then there's, you know, just leadership vacuums taking place for quite a while or people who are in the role, who had hopes that they would get that get hired for that role. And that led to I think, a bit of murkiness around decision making, …nobody actually felt really empowered to make long term decisions, long term strategic decisions, because they were like the people who were hired as directors only there for a minute before getting fired or leaving, and they will try to try to get their bearings for a lot of that time, then you had people in acting roles, who were vying for the job, or who just didn't work

SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?		
Anchor Code	Theme	Quotation
		truly empowered to be to be decision makers for the other teams as project direction." (IM) "Well, when we had leaders, it was definitely centralized; when we didn't and we had acting leaders, it was very much decentralized. Chaotic. And so, I would say one of the positives of being centralized if you have someone that truly – this is going to sound bad – but truly cares for that team and like, fight for it. I would say that's one of the positives is that like, you prevent [encroachment] from happening." (BP)

Questionnaire

In order to situate the interview data in the broader private sector intelligence field and to assess transferability of the findings, the seven subquestions were also used in the creation of a 10-question questionnaire, which allowed for open-text responses.

Procedure

An invitation to complete the questionnaire, which included the questionnaire's Survey Monkey link, was distributed to the broader private sector intelligence community via the researcher's professional network. This included posting the invitation on LinkedIn; disseminating the invitation through the Europe, Middle East, and Africa Analyst Roundtable, and posting the invitation to professionals within AIRIP and the Overseas Security Advisory Council.

Questionnaire responses were collected anonymously through SurveyMonkey from private sector intelligence professionals not employed by The Global Company. Respondents are pseudonymized by number throughout this chapter and in Chapter 5. Although there is, at present, no definitive indication of the overall population of the geopolitically-focused private

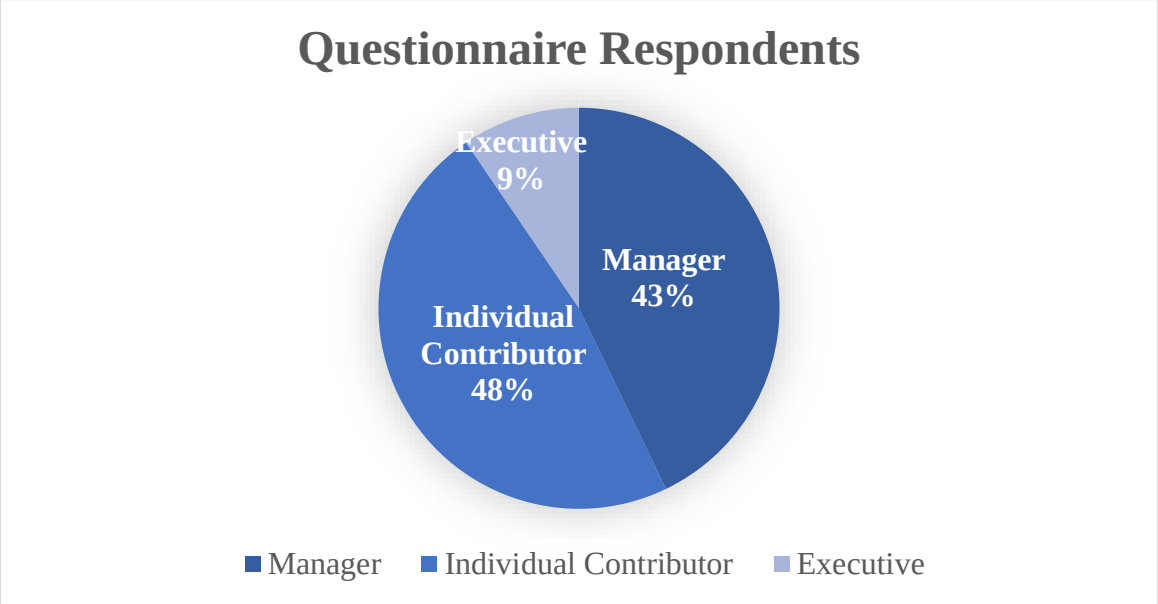
sector intelligence field, estimates by other researchers in the field indicate that the global population of geopolitically-focused private sector intelligence professionals is likely under 1,500 people (M. Robson, personal communication, June 28, 2021). Although similarly-focused surveys and questionnaires have garnered approximately 100 responses when deployed within these groups (L. Sage-Passant, personal communication, June 28, 2021), this questionnaire received fewer overall responses (72), possibly due to the explicit definitions that may have reduced the number of individuals who self-identified as geopolitically-focused private sector intelligence professionals. This questionnaire was also deployed almost simultaneously and within a similar population to a separate benchmarking survey which may have led many to opt out of participation.

Profiles

Like the interview protocol, the questionnaire also collected data regarding the professional level at which the respondent worked (individual contributor, manager, or executive), given the potential for similarities in perception based on level of seniority and/or years of experience in the field. For the questionnaire, 9% of the respondents were at the executive level (which would align with the director level at The Global Company). Forty-eight percent of respondents were individual contributors (analyst or senior analysts), while 43% reported managerial responsibilities, as depicted in Figure 4.

Figure 4

Questionnaire Respondents



Textual Coding for Questionnaire

For the questionnaire, as with the textual coding for interview participants, the researcher began with the raw data and moved through organization, reading, coding, identifying themes and descriptions associated with each code, interrelating the themes and descriptions, and then sought to develop or interpret the meaning of these themes and descriptions (Creswell, 2014). However, due to the shortened and impersonal nature of the questionnaire, despite the open text capability, responses tended to be much shorter, resulting in more direct, but less robust responses. As a result, many of the codes for the questionnaire were tied to single words or short phrases (Saldaña, 2013). For the questionnaire responses, the researcher again categorized the content from each of the respondents to consolidate meaning for the categories with aligned characteristics (Grbich, 2007; Saldaña, 2013), and similarly precoded the questions to align with the elements of the McKinsey 7S systems theory framework. Each response was broken up by theme and coded separately.

Because each question was designed to target individual elements of McKinsey 7S, there were seven anchor codes, each of which included multiple themes, resulting in 41 subcodes derived from the data. In total, the questionnaire responses yielded 374 coded segments of data. In this step, an additional coder, who was familiar with the private sector intelligence field, again assisted in establishing intercoder reliability through reviewing both the established and the emergent subcodes for consistency. However, because responses were much shorter in length, there was far less debate in the overall coding, and achieving 90% consistency in coding was much more straightforward and required much less debate. The researcher subsequently identified significant keywords or phrases in the questionnaire responses and used the coded software to highlight and code them to establish units of meaning and cluster themes. Quotations from the questionnaire responses were also included in the codebook within the MAXQDA software, building out definitions for and refining each unit of meaning. As the researcher coded the responses, the coding software tracked the frequency of themes while ensuring that the outputs remained directly linked to the underlying data, thus permitting both macro and microanalysis.

Through clustering and grouping the themes, both a textual and a structural description of each element of systems theory as seen in the McKinsey 7S framework was created, as it applied to building and leveraging intelligence teams in private sector MNEs, based on the perspectives of the broader private sector intelligence community. Because this inquiry was informed by systems theory, the elements of the McKinsey 7S systems theory framework established the initial set of anchor codes for this study, resulting in directed content analysis. However, within each anchor code, themes emerged that helped describe the experiences and perceptions of participants. Table 18 documents the number of subcodes that fell under each parent or anchor

code, based on the McKinsey 7S framework, in addition to the total number of subcodes for each anchor.

Table 18

Anchor Codes, Subcodes, and Total Code Count for Questionnaire

Anchor Code	Number of subcodes	Number of total codes
Staff	2	4
Skills	9	136
Structure	3	22
Strategy	7	43
Systems	8	105
Styles	4	10
Shared Values	8	54

Tables 19–25 detail the textual coding for all questionnaire questions (QQ1 through QQ9). Each table shows a subquestion mapped to an anchor code. Within the table, questionnaire questions are aligned with themes that arose from the coding process.

Table 19

Subquestion 1

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?

Anchor Code	Question #	Question	Occurrence of Themes
Skills	1	What skills or competencies do you believe are most necessary for a private sector intelligence team to employ?	Analytic skills (synthesis / research) - 51 Effective communication - 24 Learning agility / intellectual curiosity - 15 Subject-matter expertise - 15 Relationship-building / Networking - 10 Program management / program development - 7 Business acumen - 7 Resilience / patience - 5 Language - 2

Table 20

Subquestion 2

SQ2: What type of human and other resources might be required to adequately address business requirements levied upon this type of team?			
Anchor Code	Question #	Question	Occurrence of Themes
Staff	2	What is the size of your team?*	Existence / value unknown - 2 Regional / cultural experience or background - 2 *Overall size of team(s) ranged from 1 to 33 people, with the average size being 9 people, with a median of 6.
	3	What positions or specializations are present on your team?	

Table 21

Subquestion 3

SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?			
Anchor Code	Question #	Question	Occurrence of Themes
Strategy	5	How does your team address intelligence requirements?	Resourcefulness / adaptability / flexibility - 12 Independence / impartiality / credibility - 10 Identify risk mitigation measures - 7 Direct communication with customers / decision makers - 6 Drive business operations - 3 Decision-making support - 3 Cost-savings - 2

Table 22

Subquestion 4

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?			
Anchor Code	Question #	Question	Occurrence of Themes
Structure	6	How is your team structured?	Team is a flat structure within a hierarchical organization - 15 Cross-functional team - 5 Organized by geographic or business-alignment - 2

Table 23

Subquestion 5

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?			
Anchor Code	Question #	Question	Occurrence of Themes
Systems	4	How does your team receive its taskings?	Direct sharing with decision makers - 48 Self-generated / informal - 27 Project-tracking - 9 Customer feedback - 7 Team meetings / leader check-ins - 5 Peer review - 5 Limited / no focus on process - 2 Storage / product repository - 2
	7	What processes or procedures are associated with the day-to-day internal operations of the team, including tracking projects, coordination, etc.?	

Table 24

Subquestion 6

SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?			
Anchor Code	Question #	Question	Occurrence of Themes
Shared Values	8	What values do you see employed by your team?	Responsive / customer-focused - 19 Creativity / innovation - 10 Teamwork / collaboration - 7 Proactive / Self-motivated - 7 Dedication to the job - 5

SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?			
Anchor Code	Question #	Question	Occurrence of Themes
			Going above and beyond - 3 Psychological safety - 3

Table 25

Subquestion 7

SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?			
Anchor Code	Question #	Question	Occurrence of Themes
Styles	9	How does your team's leadership employ professional and / or skills development on your team?	Participative leadership - 5 Autonomy-supportive leadership - 2 Mentoring / providing guidance - 2 Creating opportunities for subordinates - 1

Selected Quotations: Horizontalization of Questionnaire

As with the interviews, the researcher subsequently identified specific, meaningful statements to provide insights into the questionnaire data through horizontalization (Moustakas, 2011). Tables 26–32 detail quotations drawn from questionnaire responses; each quotation is a meaningful statement which is associated with a theme that arose from within the context of the McKinsey 7S anchor codes.

Table 26

Questionnaire Quotations: Skills

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?		
Anchor Code	Theme	Quotation
Skills	Analytic Skills	"ability to distill strategic guidance into actionable tasks" (17); "analytical thought" (12); "awareness of cognitive biases and structured analytical techniques" (21); "deconflicting intelligence sources, identifying misinformation" (11); "Nonlinear thinking, critical thinking" (67); "Identifying sources and collecting information to gain insight into the questions" (25)
	Effective Communication	**"**excellent writing" (4); "clear and conscience (sic) communication" (34); "written and oral presentation skills" (28); "listening" (44); "effective communication of complex information" (35)
	Learning Agility / Intellectual Curiosity	"ability to 'get smart' on a topic quickly" (13); "the ability to consume real time data and make quick decisions to allow senior leadership the proper decision space" (27)
	Subject Matter Expertise	"geopolitical awareness and background" (57); "geospatial, social media exploitation" (63); "security engineering" (51); "regional expertise" (5); "crisis management" (30); "knowledge in geo-politics focusing on physical threats; knowledge in Cyber Security can be an added advantage" (36)
	Relationship-building / Networking	"ability to engage internal and external stakeholders" (17); "relationship building" (23); "being team players (working well with others and building bridges)" (37)

Table 27

Questionnaire Quotations: Staff

SQ2: What type of human and other resources might be required to adequately address business requirements levied upon this type of team?		
Anchor Code	Theme	Quotation
Staff	Existence of team / Value Unknown	"they want intelligence, but don't understand how it works" (23)
	Regional / Cultural Experience or Background	"global geopolitical perspective" (21)

Table 28

Questionnaire Quotations: Strategy

SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?		
Anchor Code	Theme	Quotation
Strategy	Resourcefulness / Adaptability	"flexibility / adaptability" (71) "The ability to adapt quickly to shifting intelligence requirements" (21)
	Independence / Impartiality	"impartiality" (8); "integrity" (1); "credibility" (14)
	Identify Risk Mitigation Measures	"risk reduction assessments" (2); "risk interception" (41); "mitigate risk" (70); "risk mitigation guidance" (20)
	Direct Communication with Decision Makers	"analysis that is timely and tailored to the business" (3); "customer obsession" (18)

Table 29

Questionnaire Quotations: Structure

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?		
Anchor Code	Theme	Quotation
Structure	Flat Structure Within a Hierarchical Organization	"We have 10 analysts total. In that, we have four Team Leads and one Manager. Above him we have a Director, SVP and CSO." (59); "Five analysts and one manager" (56).

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?		
Anchor Code	Theme	Quotation
	Cross-functional Team	**“**Managing Principals that oversee personnel development and work load, project managers that ensure deliverables are timely and actionable, technical intelligence principals that conduct technical operations and provide technical requirements to engineering team, OSINT analysts and forensics experts that conduct day to day analysis in support of client and business unit requirements, and data and security engineers that aggregate data and present the data for analysts” (11); “There is no separate intel team: the Security team has two analysts who perform intel and security support” (7).
	Organized by Geographic or Business Alignment	“[We are organized] by region plus a competence center for each colleague” (15).

Table 30

Questionnaire Quotations: Systems

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?		
Anchor Code	Theme	Quotation
Systems	Direct Sharing with Decision Makers	**“**occasionally receive tasking from top down” (15); “[taskings are received] From the Director, Global Security, who reports in to the VP of Legal (General Counsel)” (29); “[taskings are received from] senior corporate leadership” (35); “[taskings are received from] executive management” (47)
	Self-generated / Informal	“[taskings are] self-generated based on assessment of events” (5); “As our primary function, we are assigned to monitor world events for events which could affect the safety and security of our offices” (36); “we are self-directed and generate products and analysis on our own initiative” (7)

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?		
Anchor Code	Theme	Quotation
	Project Tracking	"Monday.com tracks all requirements and client delivery. PMs and Managing Principals review incoming intel requirements and disseminate to intel principals, operators, and analysts to execute. Technical principals and managing principals enumerate technical requirements to engineering team on tools and data needed to execute" (13); "Internal 'Trello'-like tools, tableau dash boarding to show scope and breadth of team work" (23); "Numerous ongoing trackers involving global security issues" (7)
	Customer Feedback	"We surveyed our customers' needs and priorities and distinguish between general intelligence requirements as well as individual requirements that vary based on the customer and their area of interest" (11); "We receive requests from business units (Legal, Exploration, Business Development, Operations, Country Managers...) that we translate into IRs" (13)

Table 31

Questionnaire Quotations: Shared Values

SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?		
Anchor Code	Theme	Quotation
Shared Values	Responsive / Customer-focused	**"**analysis that is timely and tailored to the business" (13); "customer focus; accountability" (6); "Timeliness, relevance, accuracy, actionable intelligence" (17)
	Creativity / Innovation	**"**open mindedness to discuss varying opinions" (25); "understanding of what intelligence is capable of" (6); "Nonlinear thinking" (18); "Creativity" (1)
	Teamwork / Collaboration	"team mentality" (1); "empathy, collaboration, respect" (3);
	Proactive / Self-motivated	"proactive" (2, 18)
	Dedication to the Job	"Sense of mission and responsiveness to allow business units to execute on business and reduce risk" (10)

Table 32

Questionnaire Quotations: Styles

SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?		
Anchor Code	Theme	Quotation
Styles	Participative Leadership	**“**after-action huddles” (16); “The senior analyst provides feedback for analysts on their work” (11)
	Autonomy-supportive Leadership	“Leadership provides the team with the autonomy and support to pursue professional development opportunities they are interested in. If there is something the employee has identified they want to research or practice in order to improve their skills, their leadership almost always supports their interest and provides them the time to do the desired training” (4)
	Mentoring / Providing Guidance	“Training and mentoring with many former civilian government and military” (15); “stresses application of a handful of leadership qualities in all our work and engagements” (17);
	Creating Opportunities for Subordinates	Managing principals lead all professional development including pushing for analysts to have speaking engagements, independent research for publication, and positive feedback from business units and clients. Senior intelligence analysts are pushed to managing principals (management track) or technical principals (technical track). Junior data engineers are pushed to ascend to product management or engineering leaders” (10).

Document Analysis

The same subquestions were also used as a framework when conducting an analysis of the documents associated with The Global Company’s Global Intelligence operations. These documents have been identified by title where they are quoted or referenced.

Procedure

Documents selected were required to meet the following criteria: (a) the documents were required to be operational in nature, addressing one or more element of systems theory highlighted in the McKinsey 7S framework; (b) the documents were required to have been either created or in use within the timeframe of this study (between 2005 and 2021); and (c) the

documents were required to be specific to The Global company's intelligence team and its operations. These criteria are also identified in APPENDIX H.

The types of documents reviewed are identified below with the number of each type of document represented in parentheses.

- Intelligence team job descriptions (JDs), core competencies, capabilities, headcount requests, and vendor capabilities documents (6)
- Intelligence team information access and services documents (2)
- Intelligence team standard operating procedures, travel justifications, and monthly budget expenditures (3)
- Intelligence product examples, product explanations, best practices, and product standards documents (5)
- Intelligence team growth plans and organizational charts (2)

Textual Coding for Document Analysis

For document analysis, as with the textual coding for the interviews and the questionnaire, the researcher began with the raw data and moved through organization, reading, coding, identifying themes and descriptions associated with each code, interrelating the themes and descriptions, and then developing or interpreting the meaning of these themes and descriptions (Creswell, 2014). However, because each of the documents had a specific purpose, coding was, again, more straightforward. For example, a job description is intended to describe the skills required for the role, and as such, the terms and phrases coded from these documents were easier to align among coders. As with the questionnaire and interviews, codes were tied to single words or short phrases (Saldaña, 2013), and the content was then categorized to consolidate meaning for the categories with aligned characteristics (Grbich, 2007; Saldaña,

2013). Although the documents were not precoded, anchor codes from the McKinsey 7S framework were, again, applied, given the purpose and intent of each document, with emergent themes identified within the documents that aligned with the various elements of McKinsey 7S. Relevant words or phrases were broken up and coded separately.

As with the interviews and questionnaire, there were seven anchor codes, each of which included multiple concepts or subcodes. In total, there were 18 documents analyzed resulting in 28 subcodes and 193 total coded segments of data. In this step, an additional coder, who was familiar with the private sector intelligence field, assisted in establishing intercoder reliability through reviewing both the established and the emergent subcodes for consistency. However, because each document had an intended purpose there was, again, far less debate in the overall coding, and achieving 90% consistency in coding was much more straightforward and required much less debate. The researcher subsequently identified significant key words or phrases in the documents and used the coded software to highlight and code them to establish units of meaning and cluster themes. These words and phrases were used to describe themes and were also included in the codebook within the MAXQDA software, building definitions for and refining each unit of meaning. As the researcher coded the documents, the coding software tracked the frequency of themes while ensuring that the outputs remained directly linked to the underlying data, thus permitting both macro and microanalysis.

Through clustering and grouping the themes, both a textual and a structural description of each element of systems theory as seen in the McKinsey 7S framework was created, as it applies to building and leveraging intelligence teams in private sector MNEs, based on the foundational documents used by The Global Company in establishing the framework for its intelligence team. Because this inquiry was informed by systems theory, the elements of the McKinsey 7S systems

theory framework established the initial set of anchor codes for this study, resulting in directed content analysis. However, within each anchor code, themes emerged that helped describe the experiences and perceptions of participants. Table 33 documents the number of subcodes that fell under each parent or anchor code, based on the McKinsey 7S framework, in addition to the total number of subcodes for each anchor.

Table 33

Anchor Codes, Subcodes, and Total Code Count for Document Review

Anchor Code	Number of subcodes	Number of total codes
Staff	3	20
Skills	7	85
Structure	1	4
Strategy	6	29
Systems	6	37
Styles	0	0
Shared Values	2	18

Tables 34–39 detail the findings for the textual coding for the reviewed documents. Each table shows a subquestion mapped onto an anchor code. Within the table, interview items are aligned with themes arising from the coding process. Because there were no documents that spoke specifically to leadership style(s), either recommended or in practice, within the intelligence team, there is no corresponding table for subquestion 7 in this document analysis section.

Table 34

Document Analysis: Subquestion 1

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?		
Anchor Code	Document(s)	Occurrence of Themes
Skills	Manager-level Job Description [Intelligence team] Standards [Intelligence team] Services Marketing Document [Intelligence team] Core Competencies [Intelligence team] Best Practices for Intelligence Assessments Headcount Request [Intel team] Capability Document Product Standards Example Risk Assessment	Analytic skills (synthesis / research) - 25 Relationship building / networking - 20 Subject-matter expertise - 14 Leadership / mentoring - 10 Business acumen - 7 Program Development / management - 5 Effective communication - 4

Table 35

Document Analysis: Subquestion 2

SQ2: What type of human and other resources might be required to adequately address business requirements levied upon this type of team?		
Anchor Code	Document(s)	Occurrence of Themes
Staff	Manager-level Job Description [Intelligence team] Core Competencies	Resources (vendor / budget / personnel) - 13 Regional / cultural experience or background - 6 Individual bandwidth - 1

Table 36

Document Analysis: Subquestion 3

SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?		
Anchor Code	Document(s)	Occurrence of Themes
Strategy	[Intelligence team] Best Practices for Intelligence Assessments	Direct communication with customers / decision makers - 15 Identify risk mitigation measures - 7 Decision-making support - 3 Drive business operations - 2 Resourcefulness / adaptability - 1 Global coverage - 1

Table 37

Document Analysis: Subquestion 4

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?		
Anchor Code	Document(s)	Occurrence of Themes
Structure	Current [intelligence team] Headcount [Intelligence team] Growth Plan [Intelligence team] Capability	Team is a flat structure within a hierarchical organization - 4

Table 38

Document Analysis: Subquestion 5

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?		
Anchor Code	Document(s)	Occurrence of Themes
Systems	[Intelligence team] Capability [Intelligence team] Standards [Intelligence team] Best Practices for Intelligence Assessments	Peer review - 12 Storage / product repository - 10 Project-tracking - 7 Direct sharing with decision

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?		
Anchor Code	Document(s)	Occurrence of Themes
	Manager-level Job Description [Intelligence team] Presentation for the Board of Directors [Intelligence team] Services Marketing Document [Intelligence Team] Products Explanation [Intelligence team] Core Competencies	makers - 5 Self-generated / informal - 2 Customer feedback - 1

Table 39

Document Analysis: Subquestion 6

SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?		
Anchor Code	Document(s)	Occurrence of Themes
Shared Values	Headcount Request Document [Intelligence team] Standards Document [Intelligence team] Capability Document [Intelligence team] Best Practices for Intelligence Assessments Manager-level Job Description [Intelligence team] Services Marketing Document [Intelligence Team] Products Explanation	Responsive / customer-focused - 13 Teamwork / collaboration - 5

Selected Quotations: Horizontalization of Document Analysis

As with the interviews, the researcher subsequently identified specific, meaningful statements to provide insights into the team through horizontalization of the documents that

serve as a framework for the work that they do (Moustakas, 2011). Some of these documents included organizational charts that showed a graphical depiction of some concepts, though they did not include specific words or phrases. In these circumstances, the researcher characterized these images through a textual description. Selected quotations and descriptions represent themes which arose within each element of the McKinsey 7S framework and are outlined in Tables 40–45.

Table 40

Document Analysis: Quotations Regarding Skills

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?		
Anchor Code	Theme	Quotation
Skills	Analytic Skills (Synthesize / Research / Contextualize)	"analysis of information" ([Intelligence Team] Manager Job Description); "[Intelligence Team] analysts scrutinize the accuracy and validity of sources, seeking to identify any inherent biases and mitigate such biases in the crafting of relevant intelligence products" ([Intelligence Team] Standards); "Effectively synthesizes multiple sources of information; Effectively contextualizes information to add value for [The Global Company]" ([Intelligence Team] Core Competencies)
	Relationship-building / Networking	"[Intelligence Team] members will seek to maintain active involvement in relevant [professional networking organizations]" … "[Intelligence team] personnel liaise regularly with the lines of business in order to best understand the needs of the business and ensure that [Intelligence team] products appropriately fill knowledge gaps for the consumer. ([Intelligence Team] Standards); "Ability to maintain and enhance relationships with key stakeholders and lines of business"…"Demonstrated facility in establishing new relationships with lines of business or those that [the Intelligence Team] has not historically worked closely with" ([Intelligence Team] Core Competencies)
	Subject Matter Expertise	"[Intelligence team] analysts serve as subject matter experts on key regions or geopolitical issues that are relevant to [the Global Company's lines of business"…"[Intelligence team] personnel seek to establish subject matter expertise on specific regional or functional issue" ([Intelligence team] Standards);

SQ1: What knowledge, skills, and abilities might need to be present on this type of team?

Anchor Code	Theme	Quotation
		"regional subject matter expertise for all lines of business in the geopolitical security realm" (Headcount Request)
	Leadership / Mentoring	"Mentors new analysts on leveraging resources, understanding business partners, developing subject matter expertise, and writing accurate, concise, and thorough assessments"…"Provides thought leadership and project management to analysts and senior analysts" ([Intelligence Team] Core Competencies); "coaches, counsels; trains, develops, and evaluates performance" ([Intelligence Team] Manager Job Description
	Business Acumen	"Foundational understanding of [The Global Company] and its lines of business"…"In-depth understanding of one or more [of The Global Company's] lines of business, including its key concerns, typical footprint and AOR, and general MO" [Intelligence team] Core Competencies)
	Program Development / Management	"Supports enterprise and department objectives by implementing action plans, timetables and outcome measurements, obtaining and allocating resources, reviewing progress, making mid-course corrections" ([Intelligence team] Manager Job Description); "Manages analytic projects, including the development, review, and delivery of a product; the development of new products, and the development of new liaison relationships, both inside and outside the company" ([Intelligence Team] Core Competencies)
	Effective Communication	"Strong oral and written communications skills and extensive experience briefing senior decision makers" ([Intelligence Team] Manager Job Description); "Effective written and verbal communication skills; strives to write and brief succinctly and with clarity" ([Intelligence team] Core Competencies)

Table 41

Document Analysis: Quotations Regarding Staff

SQ2: What type of human and other resources might be required to adequately address business requirements levied upon this type of team?		
Anchor Code	Theme	Quotation
Staff	Resources (Vendor / Budget / Personnel)	"core competencies […] are that of a full-fledged senior analyst, and as such…should be categorized as an FTE analyst" (Headcount Request)
	Regional / Cultural Experience or Background	"Has extensive international experience and exhibits appreciation for cultural differences" ([Intelligence Team] Core Competencies)
	Individual Bandwidth	"Without this role, [the intelligence team] would have a critical underlap in coverage over one of the largest regional segments" (Headcount Request)

Table 42

Document Analysis: Quotations Regarding Strategy

SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?		
Anchor Code	Theme	Quotation
Strategy	Direct Communication with Customers / Decision Makers	"…respond to a specific question or concern posed by a representative of a [Global Company] line of business" ([Intelligence Team] Best Practices); "Strives to understand audience needs in order to make assessments more effective and influential" ([Intelligence Team] Core Competencies)
	Identify Risk Mitigation Measures	"Develops and implements policy and strategy alongside the Director to assess and mitigate threats to company assets and employees…Provides effective operational input when requested, including logical and effective risk mitigation considerations." ([Intelligence Team] Core Competencies)
	Decision-making Support	"[Intelligence Team] products are intended to support operational security efforts and may address specific, strategic intelligence questions or any [The Global Company] business partner" ([Intelligence Team] Standards); "[Products] are requested by senior executives and used for high-level decision making" ([Intelligence team] Services Marketing Document).

Table 43

Document Analysis: Quotations Regarding Structure

SQ4: What considerations could be taken into account when developing a private sector intelligence team's structure?		
Anchor Code	Theme	Quotation
Structure	Flat Structure Within a Hierarchical Organization	Capability, Growth, and Headcount documents depict a structure with 6 analysts, geographically aligned, with one manager, and one director

Table 44

Document Analysis: Quotations Regarding Systems

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?		
Anchor Code	Theme	Quotation
Systems	Peer Review	"All assessments, regardless of author, will have a consistent writing style and will be coordinated within [the intelligence team] to ensure a consistent theme and messaging across regions." ([Intelligence Team] Standards); "…consistently provides peer-review for products prior to dissemination" ([Intelligence team] Core Competencies); "After writing assessment, the product will be peer reviewed by at least one other [intelligence team] analyst as well as the Manager (or Director). Additional reviewers are welcome as time allows." ([Intelligence Team] Best Practices)
	Storage / Product Repository	"All products, regardless of type or audience, will be maintained in a central repository for future reference. If necessary, access to sensitive products will be limited." ([Intelligence team] Standards)
	Project Tracking	"Upon receiving the request, the respective [intelligence team] analyst will document the request in TRELLO and verify that they have the necessary (and relevant) information to provide an accurate, relevant, and timely response" ([Intelligence team] Best Practices)

SQ5: What systems or processes could be put in place to best leverage a private sector intelligence team?		
Anchor Code	Theme	Quotation
	Direct Sharing with Decision Makers	"…communicate to executives and stakeholders as needed regarding threats as they develop" ([Intelligence team] Manager Job Description)

Table 45

Document Review: Quotations Regarding Shared Values

SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?		
Anchor Code	Theme	Quotation
Shared Values	Responsive / Customer-Focused	"Delivers threat assessment services by collecting, evaluating and disseminating accurate and timely intelligence to appropriate company executives" ([Intelligence Team] Manager Job Description); "The [Intelligence Team] tracks global developments and provides relevant, timely, and tailored strategic intelligence assessments to help business units recognize, understand, and mitigate threats, while identifying how geopolitical events could impact [The Global Company]'s employees, assets, guests, or brand." ([Intelligence Team] Services Marketing)
	Teamwork / Collaboration	"In partnership with [Crisis Management and Security Operations Center functions], supports the development of crisis management policy, plans and crisis simulation exercises designed to enhance the crisis response and crisis communication capabilities of [The Global Company" ([Intelligence Team] Manager Job Description)

Integration of Findings

In order to integrate the findings across the three domains of the study, the researcher identified the top theme in each domain, noting that skills were the top overall coded element for all three (interviews, questionnaire, and document analysis), and within the skills category, analytic skills were identified as the most prevalent for all three as well. There was significant

commonality across the subcodes for all three domains, showing consistency between the perspectives held by interviewees, who were former members of the intelligence team at The Global Company and questionnaire respondents, who were from the broader private sector intelligence community. However, the extent to which some themes were represented did differ. Given that the purpose of systems theory is to address alignment in all the elements, some natural alignment can be found between the key themes identified for individual elements. For example, "direct sharing with consumers / decision makers" was a key theme under the systems category for both the interviews and the questionnaire. This aligns with the concept of "decision support" present under strategy. Similarly, while all three domains recognized analytic skills as crucial, within analytic skills, a number of other codes were collapsed, including "resourcefulness and research skills." Resourcefulness was also identified as a key element of strategy for both the interviews and the questionnaire. A more thorough discussion of this alignment and interdependence can be found in Chapter 5, Conclusion 2 on how these teams demonstrate equifinality.

For this study, the overarching research question was: How, if at all, does systems theory explain how geopolitically-focused intelligence teams operate in the private sector? To address this research question, this study leveraged the McKinsey 7S framework to investigate seven elements of a system within the context of a private sector, geopolitically-focused intelligence team. Table 46 illustrates the top themes that correspond to each of the seven subquestions in each category for each data set, integrating the key themes from the interviews, document review, and questionnaire.

Table 46

Integration of Findings Across Domains

Anchor Code	Interviews	Questionnaire	Document Analysis
SQ2: What type of human and other resources might be required to adequately address the business requirements levied upon this type of team?			
Staff	1) Vendor Resources 2) Unclear Value 3) Regional or Cultural Experience	1) Unclear Value 2) Regional or Cultural Experience	1) Vendor Resources 2) Regional or Cultural experience 3) Individual Bandwidth
SQ1: What knowledge, skills, and abilities might need to be present on this type of team?			
Skills	1) Analytic Skills 2) Relationship building / Networking 3) Effective Communication	1) Analytic Skills 2) Effective Communication 3) Learning Agility / Intellectual Curiosity	1) Analytic Skills 2) Relationship-building / Networking 3) Subject Matter Expertise
SQ4: What considerations could be taken into account when developing a private-sector intelligence team's structure?			
Structure	1) Flat 2) Organized Geographically 3) Exist within Stovepipes	1) Flat 2) Cross-functional Teams 3) Organized Geographically	1) Flat
SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?			
Strategy	1) Customer / Business Alignment 2) Decision support 3) Resourcefulness/ Adaptability / Flexibility	1) Resourcefulness/ Adaptability/ Flexibility 2) Independent / Impartial 3) Identify Risk Mitigation Measures	1) Direct Communication with Customers 2) Identify Risk Mitigation Measures 3) Decision Support
SQ5: What systems or processes could be put in place to best leverage a private-sector intelligence team?			
Systems	1) Direct Sharing with Decision Makers 2) Peer Review 3) Self-generated / Ad hoc	1) Direct Sharing with Decision Makers 2) Self-generated / Ad hoc 3) Project Tracking	1) Peer Review 2) Storage or Repository for Products 3) Project Tracking
SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?			

Anchor Code	Interviews	Questionnaire	Document Analysis
Styles	1) Autonomy-Supportive Leadership 2) Participative Leadership 3) Centralized Decision Making	1) Participative Leadership 2) Autonomy-supportive Leadership 3) Mentoring / Providing Guidance	N/A
SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?			
Shared Values	1) Teamwork / Collaboration 2) Responsiveness / Customer-focus 3) Creativity / Innovation	1) Responsiveness / Customer-focus 2) Creativity / Innovation 3) Teamwork / Collaboration	1) Responsiveness / Customer-focus 2) Creativity / Innovation 3) Teamwork / Collaboration

The data addressed each research subquestion in light of the study's overarching research question, which was, "How, if at all, does systems theory explain how geopolitically-focused intelligence teams operate in the private sector?" As shown in Table 46, decision support, direct sharing or communication with decision makers, effective communication, and responsiveness or a customer focus were all identified under skills, strategy, systems, and shared values, meaning that these concepts were prevalent within intelligence teams in general, but they are leveraged differently in different circumstances. For some, sharing directly with decision makers was the overall strategy employed in order to achieve the goal of supporting decision-maker needs. In other circumstances, it was a shared value–striving to be responsive and customer-focused. And in still other circumstances, it showed up as a skill–effective communication. The integration of these findings across domains demonstrated the interdependence of each of these elements in determining how a geopolitically-focused intelligence team operates in the private sector, as shown in Table 47.

Table 47

Grid of Interdependent Variables

	Structure	**Staff**	**Skills**	**Systems**	**Shared Values**	**Strategy**	**Leadership Styles**
Structure	*Flat structure	A flat structure determines the division of labor on a team and thus the size of a team needed to accomplish its objectives.	A structure, whether flat or layered, serves as a framework for the responsibilities and expectations surrounding skill levels for differing roles on the team.	Flat structures facilitate direct communication with decision makers.	Flat structures encourage collaboration and enhance team members' reliance on one another.	Flat structures support a strategy intended to facilitate direct communication with decision makers and align levels of responsibility with skill and experience.	A flat structure and smaller team encourages participative and autonomy-supportive leadership styles as leaders are more directly engaged in the day-to-day work of the team.
Staff	External staffing support and increased expertise from regional or cultural experience reduces the headcount requirement on a team.	*Vendor resources *Unclear value *Regional / Cultural Experience	Smaller teams with fewer staff members will require more external support and/or experienced or highly-skilled individuals to accomplish team objectives.	A small team will need to leverage effective systems to streamline communications with consumers due to a lack of bandwidth.	A small team will rely more heavily on fellow team members and experience increased collaboration and receptivity to creative or innovative solutions.	Limited staffing levels will undermine a team's capability to accomplish its objectives due to finite bandwidth.	A small team will encourage increased engagement from leaders.

	Structure	**Staff**	**Skills**	**Systems**	**Shared Values**	**Strategy**	**Leadership Styles**
Skills	The employment of highly skilled individuals on a team will result in formal or informal structures aimed at leveraging their expertise.	The employment of highly-skilled individuals will result in the need for less headcount to accomplish the team's objectives; it will also reduce the requirement external /vendor support.	*Analytic Skills *Relation-ship building / Networking *Effective Communicat ion	In the absence of needed skills, systems will be required to provide step by step guidance to ensure that intelligence professionals accomplish team objectives.	Analytic skills and expertise will encourage increased engagement between team members as they trust each other and leverage each other's knowledge and experience.	Enhanced skills support increasingly complex strategies in order to support decision-maker needs.	A leader will determine who to engage with based on analytic and subject matter expertise, including how they seek to develop skills and to whom they assign tasks.
Systems	Streamlined systems enable flat structures through facilitating increased reach without requiring additional expertise or specializa-tion.	Streamlined systems will enable fewer personnel to accomplish more work through simplifying the required processes and procedures.	Streamlined systems require fewer specialized skills to operate and enhance efficiency, allowing skills to be leveraged more effectively.	*Direct sharing with decision-makers *Peer review *Self-generated / Ad hoc	Ineffective systems hamper collabora-tion and innovation by creating confusion and blurring lines of responsibili-ty.	Systems are the implementa-tion mechanism for strategy.	The ability of analysts to share information directly with decision-makers increases the responsibili-ty for leaders to engage with and provide professional development to their team members.
Shared Values	Collabora-tive values encourage a preference for a flat structure.	Values of teamwork and collaboration will determine to what extent external vendors are engaged and relied upon for information.	Shared values of collaboration encourage the development of professional networking skills.	Shared values will dictate which systems are used based on their alignment with culture. (i.e., systems that promote collabora-tion).	*Responsive / customer-focused *Teamwork / Collabora-tion *Creativity / innovation	Collabora-tion supports a team's strategy of providing support to decision makers (i.e., adhocracy vs. market).	Collabora-tive values reinforce participative leadership.

	Structure	**Staff**	**Skills**	**Systems**	**Shared Values**	**Strategy**	**Leadership Styles**
Strategy	Strategy informs and directs the structure needed for a team to achieve its objectives.	Strategy dictates the staffing levels needed to accomplish an intelligence team's objectives.	Strategy defines the type of skills that are needed on a given team in order to address the current and future challenges the organization faces.	Strategy provides direction for designing systems because systems are an implementation mechanism for strategy.	Strategy directs how workers engage with one another and with their organization, thereby establishing the team's organizational context and shared values.	*Direct Communication with customer / decision-makers *Resourcefulness / Adaptability / Flexibility *Customer / Business alignment	A team's overall strategy guides its leaders in how they approach, develop, and leverage team members.
Leadership Styles	Leaders develop a structure and/or may use structure to increase influence either internally or externally.	A leadership style that is not autonomy-supportive or is otherwise misaligned with the team's values will result in staffing concerns, such as turnover and retention issues.	Leadership styles determine how a leader leverages skillsets on a team and their investment in developing individuals' skills.	A participative leader will avoid implementing impersonal systems.	Leadership styles guide the team's organizational culture and sets its shared values. The leader sets the tone.	Leadership styles directly determine a team's values as the leader guides the development of organizational culture.	*Autonomy supportive leadership *Participative Leadership

Table 47 provides examples of the bidirectionality of each individual relationship between elements of systems theory, as well as the overall interdependence of each component part——a key feature of systems theory. However, as described in the conceptual framework, while each individual element relates to another on a theoretical continuum, each factor is acting on several other factors contemporaneously, creating three-or even four-dimensional relationships where an individual element is acting on others and being acted upon by multiple vectors from multiple directions at any given time. As such, these examples are two-dimensional and thus may not give a complete picture of the interactions of these elements.

For example, if strategy were to change dramatically or something were to occur to change the ability to engage with consumers directly, such as a new piece of technology or a change in leadership, the entire system could shift in a new direction, in addition to a realignment of every element within the system. This is highlighted by the example of different elements within a system leveraging each other provided in Finding 1, wherein an intelligence team's strategy leverages analytic and communication skills to accomplish its objectives: to inform decision makers, and at the same time, the requirement to inform decision makers dictates what types of skills must be employed on these teams. In this example, the team's ability to accomplish its strategy is reliant on the skills employed on the team, while at the same time, the skills needed on the team are dependent on what strategy is employed. However, these relationships are not operating in isolation, but rather are also influenced at the same time by staffing levels, structure, and leadership styles, shared values, and

Another example of this interdependence can be seen in how skills were characterized within the data. Skills (such as analytic skills) are reliant on the ability to contextualize information for the consumer or decision-maker, who is external to the team (system). However, the information being synthesized and contextualized is often based on the geopolitical context– which also exists external to the team. This bears the hallmarks of an open system, since the team's operations are clearly influenced by the external context or larger system within which the team operates. The skills employed on the team are leveraged through systems (i.e., information sharing processes) as a part of the strategy (i.e., supporting decision makers). This interdependence runs both ways. Simplistically speaking, while these analytic skills are leveraged to inform executive decisions, executive decisions and the evolving needs of decision makers also influence what information is collected and how it is presented and contextualized

for decision makers. Similarly, the skills employed on the team have a significant impact on the staffing levels required to accomplish the team's goals and thus the execution of its strategy, while the staffing levels will constrain or enhance the skills employed on the team, and the strategy will influence–whether positively or negatively–how staffing and skills requirements are assessed. The interactions of these elements within a system also contribute to the concept of optimized equifinality: all elements are leveraged in an effort to achieve a common final objective: support to decision makers.

In a third example, leadership styles influence skills because leadership styles will often dictate how a leader leverages skillsets on a team and their investment in developing individuals' skills. However, at the same time, the skills employed on a team influence how a leader chooses to approach and engage with their team, who they assign tasks to, and how they seek to develop their personnel. Similarly, strong professional networks or added vendor support can augment a team's headcount, allowing a team with fewer personnel to work with greater efficiency, meaning that staffing considerations are an integral part of the overall strategy to address decision-maker needs. However, if strategy or decision-maker needs should change, this would alter the type and level of vendor support that could be leveraged towards that objective. A more concrete example of this shifting need can be seen in organizations with dynamic assets, such as international development programs or international news organizations. In such situations, an intelligence team might leverage specific vendors to provide real-time support and intelligence in order to support a deployed team in a conflict zone from a security perspective, but once that team departs the conflict zone, the level and type of support needed may shift in order to align with a changing strategy. In this manner, the VUCA context is both permanent due to a changing

global environment, and conditional, due to the specific needs of an individual company (business alignment) and the needs of its decisionmakers.

Chapter Summary

This chapter, and the corresponding tables, detailed the findings of the study, which was guided by the central research question and seven subquestions, which were aligned with and informed by the McKinsey 7S systems theory framework. The study was undertaken based on the problem and purpose statement, which served as parameters for the execution of the study. Each element of the McKinsey 7S framework was studied within the context of an individual intelligence team and within the broader private sector intelligence community, and for each element, several themes emerged. These themes, and the study's key findings in response to the research questions, are integrated with the literature, analyzed, and discussed in depth Chapter 5. These findings are:

- F1. *Strong analytic and effective communication skills are critical for intelligence teams.*
- F2. *Professional networks and vendor resources serve as force multipliers and augment headcount for intelligence teams.*
- F3. *Intelligence teams rely on resourcefulness, adaptability, and flexibility in order to address decision-maker requirements.*
- F4. *Intelligence teams tend to prefer a less hierarchical structure*.
- F5. *Direct communication with decision makers is critical to an intelligence team's effectiveness.*
- F6. *Private sector intelligence teams value collaboration and teamwork.*

- F7. *Autonomy-supportive leadership encourages professional development and helps to build a positive work environment for intelligence professionals.*
- F8. *Many private sector intelligence teams face challenges in establishing their team's value proposition for executives.*
- F9. *A clear strategy is critical to the development of an effective intelligence team*.

Chapter 5: Discussion of Findings

Chapter Overview

This chapter provides both an overview of this study's key findings and an interpretation and discussion of those findings in the context of the study's overarching research question and the seven related subquestions. Section headings for this chapter include Introduction, Findings, Conclusions, Implications, Recommendations for Further Research, Evaluation, and Chapter Summary.

Introduction

The central research question that guided this inquiry was: How, if at all, does systems theory explain how geopolitically-focused intelligence teams operate in the private sector? The purpose of this study was to explain, using a systems theory lens, how the interdependence of the myriad components in geopolitically-focused intelligence teams in U.S.-based private sector MNEs could impact their functioning. This included organizational elements as well as the geopolitical and organizational context in which they exist. Through the perspectives of the study's interviewees and questionnaire respondents, and the analysis of associated documents, various themes, challenges, and opportunities were identified.

Findings

By leveraging a systems theory lens in this study of private sector, geopolitically-focused intelligence teams, several themes emerged, which resulted in nine key findings. These findings were underpinned by the McKinsey 7S systems theory framework, which was used to categorize these components into themes related to structure, systems, strategy, staff, skills, leadership styles, and shared values. The findings contextualize the conceptual framework and represent an integration of each of the layers, showing how they are interdependent: influencing and

informing one another and demonstrating how open systems theory can effectively explain the operations of private sector intelligence teams through both interdependence and equifinality.

F1. Strong analytic and effective communication skills are critical for intelligence teams.

According to this study, analytic skills, networking or relationship-building skills, effective communication skills, subject matter expertise, and learning agility or intellectual curiosity were all critical to these teams. Although all of these skills were identified as important for these teams, analytic skills were identified as the top overall skill set and featured most prominently in all three domains. Further, across the interviews, questionnaire responses, and document analysis, analytic skills were the most prevalent theme within any of the anchor codes. When viewing these teams as systems, strong analytic and effective communication skills explain how these teams operate in the private sector through the skills that they leverage to achieve their objectives. The interdependence of analytic skills with the other elements of the system, including staffing, strategy, and structure are also indicative of an intelligence team's operation as a system.

Based on the coding, analytic skills consisted of analysis, synthesis of data, and contextualization of that data for a decision maker or consumer. It was these three aspects that together formed the core definition of what interview participants, questionnaire respondents, and documents all characterized as "analytic skills". However, these analytic skills also included critical thinking and research acumen, indicating that the identification of trustworthy sourcing, and evaluating information sources for validity and relevance are also a part of the analytic process, going well beyond simple collation of data. Through Bloom's taxonomy (Bloom et al., 1956), analysis is seen as a higher order skill within the cognitive domain, wherein information is broken down into its component parts and used to make inferences and support

generalizations. The synthesis element of intelligence analysis is one step above analysis within Bloom's taxonomy, requiring the use of component pieces of information to form a cogent assessment (Anderson & Krathwohl, 2001; Bloom et al., 1956; Hoy, 2007).

These analytic skills, however, could not be leveraged to effectively accomplish an intelligence team's objectives without the ability to inform decision makers through effective communication skills. This communication frequently takes place through an established relationship wherein the decision maker trusts the subject matter expertise of the intelligence professional. Thus, while analytic skills were the top coded skill to employ on these teams, the effectiveness of the team depends on more than simply producing good analysis. It must also take into consideration the skills, systems, and relationships that facilitate the communication of this information, as well as the intent or purpose for the provision of information. In this manner, F1 maps to subquestion 1, which asked what type(s) of knowledge, skills, and abilities might need to be present on this type of team, showing that both analytic and strong communication skills are critical for these teams. However, it also has implications for subquestions 3, 5, and 7, as demonstrated by the interdependence of an analyst's skills on the strategy, systems, and leadership approaches that are employed within the team, as the ability to engage with executive-level decision makers was found to fall in all of these categories.

As evidence of the applicability of a systems theory approach, the type(s) of skills, and how and to what extent these skills are leveraged on these teams will depend heavily on the strategy being employed and the systems that are in place to allow these professionals to effectively engage with their consumers. Further, the level of skill an analyst possesses will influence the type of leadership approaches used for team members. Concomitantly, the leadership approach and style will also dictate how and to what extent a leader invests in the

professional development of team members, showing the bidirectionality of the relationship between skills and leadership styles, thus supporting the concept of interdependence in intelligence teams as systems. Finally, this finding also highlighted the open systems nature of these teams, because the recipient of the information is external, but through feedback can alter the team's operations. The analytic information is also shared through systems (i.e., information sharing), showing how skills and systems leverage and influence each other.

F2. Professional networks and vendor resources serve as force multipliers and augment headcount for intelligence teams.

According to this study, vendor support, regional or cultural experiences, and individual bandwidth were all important resources for these teams to draw upon. Although subquestion 2 was originally focused primarily on personnel from a headcount and staffing perspective, many of the responses highlighted concepts that can be leveraged as force multipliers—for example, vendor support and professional networks. The existence of strong professional networks or added vendor support can augment a team's headcount, allowing a team with fewer personnel to work with greater efficiency. This finding demonstrates the applicability of systems theory in explaining how geopolitically-focused intelligence teams operate through equifinality. Although finding 2 identifies professional networks and vendor resources as key elements of staffing for geopolitically-focused intelligence teams in the private sector, not all teams leverage vendor resources in the same manner. For example, some intelligence teams have analysts from vendor organizations embedded within their teams, whereas other teams only leverage vendors as sources of information, and still others may only avail themselves of the very limited vendor-created content that is free of charge.

Another example of these different approaches can be seen at the intersection of systems and staffing. When staffing levels are inadequate, teams may seek to leverage more impersonal means of conveying information because they don't have the bandwidth for face-to-face communication with all of their potential consumers. Similarly, they may seek to find efficiency through leveraging one intelligence product to broadly address a multitude of intelligence requirements, rather than being specific or targeted in their approach. But equally, a new strategic initiative, especially one wherein the team lacks the bandwidth or staffing resources to accommodate, may necessitate increased staffing levels, or a system that streamlines communication processes and frees up bandwidth may result in fewer staffing requirements. These examples of differentiation in how resources are leveraged, despite the common objective of supporting decision-maker needs is further evidence of equifinality in intelligence teams, a key component of systems theory.

Further by employing intelligence professionals with a specific regional expertise or cultural experience, these professionals may become more efficient at their jobs because they have a frame of reference for geopolitical trends or incidents. Such a frame of reference may allow them to work more quickly, requiring less time to research to understand historic trends or incidents. It may also help them to pick up on nuances that may not be as obvious to those without such expertise. As Robson (2018) noted, geopolitical intelligence professionals are positioned to identify the markers of regional and global change and to use their knowledge to inform strategic business decisions in an uncertain world. As these abilities are attuned to nuances within their areas of expertise, they are able to advise leaders authoritatively. However, such expertise is often niche and may not be as advantageous outside of a specific topic, country, or incident.

This regional expertise or cultural experience may also be leveraged in building subject matter expertise for a particular geopolitical issue or region. Although subject matter expertise was identified as a key skill under subquestion 1, there is a natural relationship between the experiences and background that professionals bring and the skills that they may have developed that they can bring to bear on a situation. Further, many vendor organizations build their offerings around subject matter expertise, often offering the knowledge and skills of their own analysts who may have relevant backgrounds or are based in a geographic region of interest. Similarly, many of the analytic and professional networking organizations in the field are based around a common region of focus–such as Analyst Roundtable Groups or the U.S. Department of State's Overseas Security Advisory Council's Common Interest Councils, which allow professionals who lack specific content expertise to leverage the expertise of their professional cohort.

Finding 2 maps to subquestion 2, which asked what type of human and other resources might need to be present on this type of team. However, this finding also has implications for subquestion 3, which addresses strategy, given the implications that added expertise may have in how an intelligence team addresses evolving decision maker needs. It also has implications for systems–the processes and procedures on these teams (subquestion 5), as it increases the available resources for these teams and may impact how they accomplish their work.

F3. Intelligence teams rely on resourcefulness, adaptability, and flexibility in order to address decision-maker requirements.

According to this study, intelligence teams employ strategies that leverage resourcefulness, adaptability, and flexibility in order to address decision-maker requirements. This flexibility is likely borne out of necessity, as intelligence teams require the latitude to take a

unique or innovative approach when a decision maker encounters a challenge that previous intelligence frameworks may not address (Prestwood, 2018; Widhalm & Lunardi, 2018). Because many of these challenges arise out of the VUCA context, flexibility is necessary in order not to limit or predetermine outcomes (Hill et al., 2014). Finding 3 demonstrates the utility of a systems theory approach in understanding what elements are considered in developing strategies for private sector intelligence teams. Moreover, it demonstrates an open systems approach due to its adaptation to its organizational context and the needs of external decision makers, and because it maps to several of the research subquestions, it demonstrates the concept of interdependence.

F3 addresses subquestion 3, which addresses necessary elements of strategy for private sector intelligence teams, identifying the need for flexible, adaptable, and resourceful professionals on intelligence teams, since they will have to leverage those skills to accomplish their work. Although resourcefulness, adaptability, and flexibility are not strategies in and of themselves, they are elements that should be considered when devising a strategy for these teams. F3 also addresses subquestions 4, 5, and 6, as well. First, it identifies that structure must be flexible and malleable, in order to support evolving needs; second, it highlights that and processes and procedures must be flexible to support these shifting requirements; and third, it suggests that intelligence teams should integrate this necessary flexibility into their shared values, as well.

F4. Intelligence teams prefer a less hierarchical structure.

This study found that a flatter structure tends to be the most efficient structure for these teams, though they often exist within organizational stove-pipes. Because these teams focus on responding to decision-maker queries in a timely fashion, a flatter structure allows for increased

efficiency. However, at times, these teams are buried beneath larger hierarchical structures or exist within a siloed or stove-piped organization, making it challenging for individual contributors to share information directly with the decision maker they are seeking to inform. This finding addresses the overarching research question through demonstrating the role of structure in the operations of private sector intelligence teams. In short, a flatter structure tends to better support the systems they tend to leverage (direct communication with decision makers, whether in written or oral form) and thus the overall strategy of supporting decision-maker needs. Although a preference for flat structures is common across a number of different types of teams and is not specific to private sector intelligence teams, in this study it highlighted the importance of the role of structure in implementing strategy and supporting systems. As such, this preference is less about the structure itself but rather how it supports or inhibits implementation of strategy. This interdependence is a hallmark of systems theory.

This finding also highlighted the concept of open systems, because many of these teams exist within hierarchical, stove-piped, and/or bureaucratic structures in their broader organizations. Thus, while there may be a preference for a flat structure, the external structure can influence the internal dynamics of an intelligence team as its efficacy is tied to its ability to exist within and adapt to the constraints and dynamics of that external environment (Cummings & Worley, 2016; Montuori, 2011). These siloes can create barriers to the ability of these teams to liaise with consumers outside of their particular segment of an organization and inhibit potential consumers from realizing the value of intelligence in their decision-making processes.

These teams also tend to be aligned geographically, allowing for a team of equals with each person having a different regional focus and thus expertise in different regions. However, in some cases, these teams are aligned by business segment or exist in a cross-functional or

matrixed organization. Regardless of area of expertise, on comparatively small teams, individual analysts may be the only subject matter expert on a given topic, meaning that they need to be trusted to provide crucial information for decisionmakers of all levels, in some cases, despite being more junior. This need thus speaks to not only structure (title and authority), but also to the skill level required of individual contributors, in order to be able to communicate confidently with senior leaders. Regardless, these differing structures also demonstrate how a systems theory approach explains how these teams operate through the concept of equifinality, showing that it is the alignment of the system–leveraging each element effectively in concert with the others–rather than an optimal structure, that allows for effectiveness.

F4 maps to subquestion 4, which asked what considerations could be taken into account when developing a private sector intelligence team's structure. However, it also has implications for subquestion 6, which relates to shared values, as the ability for intelligence professionals to collaborate with one another is improved when hierarchical constraints are removed. It also raises questions related to subquestion 7, as a flatter structure may not allow for advancement in title, and may present leadership challenges in growing and developing these teams. These challenges may also lead to follow-on challenges related to the long-term strategy for these teams (subquestion 3).

F5. Direct communication with decision makers is critical to an intelligence team's effectiveness.

Aligned with finding 4, that geopolitically-focused private sector intelligence teams prefer a flatter structure, according to this study, direct sharing with decision makers is critical to effective processes on private sector intelligence teams. However, several challenges were embedded within the concept of sharing directly with decision makers. These included developing a structure that facilitated this direct sharing, ensuring that individual contributors

have the requisite communications skills and professional stature to liaise directly with executives, and the ability to ensure that a decision maker is aware of the team's value proposition. Further, having the latitude to generate products based on an individual team member's expertise and understanding of a decision-maker's needs can facilitate this direct sharing through more effective products. As the research question asks how systems theory explains the operations of these teams in the private sector, understanding the processes and procedures involved in private sector intelligence production is particularly relevant. Further, because the decision makers that these processes seek to support are external to the team, this finding demonstrates an open systems approach because of the direct influence and interaction between the system and its external environment.

Gill et al. (2009) and Wheaton and Beerbower (2006) noted that the intent of intelligence is to reduce the level of uncertainty for a decision maker, and Fingar (2011) noted that intelligence is meant to facilitate better decisions. However, according to Foster (2020), leaders are facing a VUCA environment wherein they are required to respond to evolving threats and adjust to these changes in real time. In order for leaders to leverage intelligence in this rapidly shifting context, intelligence professionals must understand both the VUCA context and the business questions it raises for these decision makers. In order to do so, reducing the number of layers between the producer of intelligence and the consumer allows for more timely provision of information. It also allows for a more accurate understanding of the decision-maker's needs.

All three data sources revealed the importance of direct sharing with decision makers as both an element of strategy and as an element of systems. The nuance is that as a strategy, intelligence analysts needed to ensure that their products supported decision-maker needs, though with regard to systems (i.e., how the information is conveyed), the clear preference was

that it be direct and without filters, as barriers, filters, and layers can dilute or alter the meaning of intelligence and may also inhibit its timeliness. Interviewees in particular noted perceptions and experiences that found that additional, unnecessary layers between an intelligence producer and an intelligence consumer rendered intelligence less effective in addressing decision-maker needs. Because direct sharing and direct communication with decision makers was viewed as a strategy by some and was portrayed as a system (process) by others, this demonstrates the concept of equifinality in these teams, as similar concepts are leveraged in different ways to achieve the optimal end state of supporting decision-maker needs.

F5 maps to subquestions 3 and 5. It is clear that when determining the strategy for these teams, direct sharing with decision makers and decision support are critical considerations in understanding private sector geopolitical intelligence teams from a systems theory perspective because they are key elements of strategy for these teams–providing support to decisionmakers. Furthermore, as one interviewee noted, in the private sector, a relationship with an intelligence consumer is often much more direct than in the public sector, where only briefers or those directly involved in the decision-making process are at the table with a decision maker. Direct communication with decision makers is also an element of systems as the process of sharing information builds the necessary relationships to allow these teams to understand their consumer's needs and thus refine their support accordingly. F5 also aligns with F1 in that effective communication skills are necessary to communicate with executives in a professional context. Because the concept of direct communication with decisionmakers addresses elements of strategy, skills, and systems, it further demonstrates the interdependence of these component parts, and provides further examples of the applicability of a systems theory approach with regard to these teams.

F6. Private sector intelligence teams value collaboration and teamwork.

According to this study, intelligence teams place a priority on collaboration and teamwork. Although many intelligence professionals, particularly at the working level, have responsibilities as individual contributors, they often share duties with other team members, requiring them to leverage professional relationships to do their work. Further, teamwork and collaboration and creativity and innovation—which was also identified as shared values on these teams—could both be considered force-multipliers, allowing comparatively small teams to provide outsized impact through efficiency and creative solutions. Teamwork and collaboration were rated highly in the category of shared values, but also appeared in the context of systems. In this sense, they are both a system (how the work is accomplished) and a shared value (the organizational context within which the team works). They were also identified as force-multipliers when it came to staffing considerations. This demonstrates equifinality, as teams leverage these concepts in differing ways in their operations in order to achieve their objectives.

According to Katzenbach and Smith (1993), a team is a collection of individuals who blend their skills in pursuit of a unified goal and who are mutually responsible for performance outcomes. Given the division of labor on these teams, particularly by geographic region, intelligence teams are in alignment with this definition. Teamwork is also indicative of a clan culture (Cameron & Quinn, 2011), which are characterized by personal relationships and define success in the context of addressing the needs of the customer.

F6 addresses subquestion 6, which asked what elements of organizational culture might need to be taken into consideration in building and leveraging private sector intelligence teams. However, F6 also has significant implications for subquestion 7, which asked what leadership approaches might be best suited to the growth and development of these teams, because clan

cultures, which value teamwork, align with McGregor's (1966) theory y. According to theory y, employees enjoy working and are committed to their work, resulting in managers entrusting their employees with greater ownership of their work (McGregor, 1966). Increased ownership of one's work is one aspect of autonomy-supportive leadership (Deci & Ryan, 1985).

F7. Autonomy-supportive leadership encourages professional development and helps to build a positive work environment for intelligence professionals.

According to this study, autonomy-supportive leadership was found to be a key element in encouraging the growth and development of private sector intelligence professionals. Because these teams operate in a knowledge domain, an autonomy-supportive leadership style allows for greater accountability and responsibility and removes some of the control that management may have over employees (Herzberg et al., 1959). This aligns well with the preference for a flatter structure, because it allows for increased agility and responsiveness to consumer or decision-maker needs. It also allows for the development of expertise through taking on increasingly challenging tasks. From a systems theory perspective, the interdependence of these concepts demonstrate that these teams operate well in an environment in which the leadership encourages autonomy and thus facilitates professional development.

Autonomy-supportive leadership also helps to establish an environment wherein an employee can experience the three basic needs of relatedness, autonomy, and competence, as identified in self-determination theory (Deci & Ryan, 1985). Provision for these three basic needs correlated positively with achievement, showing that this type of leadership has positive implications for overall professional development. Herzberg et al. (1959) proposed that increasing responsibility, challenge, and creativity in work environments are a part of this autonomy-supportive leadership style.

F7 maps to subquestion 7, because it highlights a leadership approach (autonomy-supportive leadership) which is suited to the growth and development of private sector intelligence teams. However, F7 also has implications for subquestion 3, because strategy entails addressing the long-term growth and development of the team as a whole and also the individuals whose skills and capabilities are leveraged to address evolving decision-maker concerns. Through understanding what leadership styles might be leveraged to develop these teams, long-term strategy can also be addressed. Further, autonomy-supportive leadership encourages professional development and helps to build a positive work environment for intelligence professionals. Finding 6 highlighted shared values that encourage a particular leadership style (autonomy-supportive leadership), yet that leadership style also supports a specific set of shared values within that organizational culture and encourages professional development, which fell into the category of skills. The interdependence of leadership styles, skills, and strategy further supports a systems theory approach in understanding how these teams operate in the private sector.

F8. Many private sector intelligence teams face challenges in establishing their team's value proposition for executives.

According to this study, although the intent of intelligence is to reduce the level of uncertainty for decision makers (Gill et al., 2009; Wheaton & Beerbower, 2006), many executives do not understand the utility of these teams or are unaware of the value that they bring to the decision-making process. As HU described it, "none of our customers [knew] what we [did], no matter how well you educate them, no matter how close you work with them," As a result of this lack of clarity regarding an intelligence team's value proposition, despite the many executives who are taking advantage of their company's intelligence capability, intelligence

professionals still struggle to reach some key consumers and may not be supporting some of the most critical decisions being made by executives. The reason for this disconnect is not clear, though the nascency of the field, organizational siloes, decision maker confidence, hectic executive schedules, and public misconceptions regarding intelligence are all plausible explanations. In addressing how geopolitically-focused intelligence teams operate in the private sector through a systems theory lens, finding 8 highlights the challenges that these teams face in their operations through identifying deficiencies that arise when there is a disconnect between the interdependent component parts.

Although F8 does not directly map to any of the subquestions, it was highlighted in the context of subquestions 2 (staffing), 3 (strategy), 4 (structure), 5 (systems), and 7 (leadership styles), and thus has broad implications for intelligence teams as systems because it goes to the very purpose of these teams. This broad applicability once again highlights the interdependence of the various components of intelligence teams when viewed as systems, but more importantly, it highlights the concept of open systems, revealing the criticality of a team's engagement with its external environment, including its organizational context and external consumers, in order to establish its value.

F9. A clear strategy is critical to the development of an effective intelligence team.

According to this study, intelligence teams require a clear strategy in order to operate effectively. Given that these teams are typically engaged in supporting strategic decisions, establishing a sound strategy for the team's overall growth and development is tied to articulating its value proposition to key decision makers. According to Hatch and Schultz (2002), an organization's strategy describes how an objective will be achieved. Kouzes and Posner (2011) noted that a clearly-defined strategy and subsequent implementation plan are both

necessary. However, during this study, while interviewees and questionnaire respondents alike provided a number of insights regarding elements of strategy, these insights often lacked specificity. For example, customer or business alignment was identified as a general theme, but participants did not provide direction or identify how a team might employ business alignment to achieve its objectives. Direct communication with decision makers was also a prominent theme, but it lacked specificity, as well. Several questions emerged with regard to how strategy is–or can be–devised and implemented on these teams. For example, how is direct communication employed? Is there a schedule or format? How are relationships built to ensure that direct communication is fostered? How is feedback solicited, tracked, and addressed? F9 demonstrates the criticality of strategy in understanding how intelligence teams operate in the private sector; however, it also demonstrates an open systems approach because the team's internal strategy is reliant upon a consumer that exists external to the team itself.

The lack of specificity in strategy may be, in part, due to the nascency of the field, and the responsive and flexible nature of the work. Because these teams must evolve to address changing decision maker needs, a rigid or overly specific strategy may hamper the necessary resourcefulness, adaptability, and flexibility. However, a strategy that is too vague is equally unhelpful, because it fails to provide the necessary direction. According to Senge (1990), a well-defined strategy connects long-term objectives to daily tasks.

F9 mapped directly to subquestion 3, which asked about elements that may need to be considered in developing an intelligence team's strategy. However, because strategy implementation affects an entire organization, requiring that organizational structures and processes be aligned to support it (Sterling, 2003), F9 also has implications for subquestion 4 (structures) and subquestion 5 (systems). This demonstrates both the interdependent nature of the

various elements of systems theory as well as the open systems concept as the strategy is heavily dependent on adapting to shifting requirements that are external to the system.

Conclusions

While key themes emerged as considerations within the topics of structure, strategy, shared values, style, staff, and skills, there were some themes that cut across each of these topics, highlighting the natural alignment of private sector intelligence teams as systems, as the interconnected parts are leveraged to achieve an optimal result. These nine findings have been synthesized into four overall conclusions. Due to the interconnected nature of a system's component parts, there was also significant overlap in some of the themes, emphasizing the concept of equifinality within these teams as each component was leveraged differently in different contexts and on different teams. Further, within these topics, analytic skills represented the most-cited skill to employ on these teams, and this study was able to develop an understanding of what these analytic skills entail. Finally, some common themes emerged surrounding the challenges these teams face, particularly in the areas of strategy and communicating a private sector intelligence team's value proposition to executive-level decision makers.

Conclusion 1: Alignment of Intelligence Teams as Systems

This study revealed a natural alignment in viewing intelligence teams as systems, and thus the relevance and utility of using a systems theory approach when building and leveraging intelligence teams. For example, various key systems theory elements–including homeostasis, equifinality, adaptation, open systems, interrelated component parts, and feedback loops, have all been identified as impactful on the operations of private sector intelligence teams. Homeostasis speaks to a level of stability that underpins an organization amidst changing circumstances. In

this case, it aligns with the objective of mitigating uncertainty for decision makers. Adaptation was also addressed throughout the data as participants and respondents alike made reference to the need to remain flexible and to continually refine their work to address decision maker needs within a feedback loop. This adaptability was also found to be critical in intelligence teams from an open systems perspective, as these teams seek to continually change and iterate based on the organizational and geopolitical context, as well as the needs of decision makers and consumers who are external to the team itself.

The utility of a systems theory approach is further exemplified in the interdependent nature of critical skills, strategies, structures, leadership styles, and shared values. All three data sets established that employing analytic skills on these teams is of paramount importance. These critical analytic skills leverage research skills and encompass critical thinking to find and evaluate trustworthy information, the synthesis of multiple, disparate sources of information, and the ability to contextualize that information for the consumer. In the case of a private sector intelligence team, that consumer is typically identified as a business decision maker. Interview participant BW described these critical analytic skills as "formulate[ing data] into…a coherent outlook and forecast so that the decision maker…understands." Although this explanation of analytic skills includes synthesis and contextualization of information, it also adds the element of coherent communication, which was another key skill identified by both interview participants and questionnaire respondents. Similar to BW's description of coherence, according to BP, these communication skills entail being "concise" and "clear."

BW's description of analytic skills also describes informing a decision maker as the purpose of the analytic work, which was highlighted by interviewees and identified in the document analysis as a key element of strategy. According to SL, during their time on the team,

as a result of doing good work, intelligence had become "indispensable to the decision making [process]." BW's description assumes that the "coherent outlook" will be shared with the decision maker, which is an element of systems (direct sharing with consumers) identified by both interview participants and questionnaire respondents. In short, "The consumer who requested the product was responsible for making a decision" (CM). Finally, because it puts the decision maker at the forefront of the effort, it highlights the responsive or customer-focused nature of the work, identified as one of the top elements of shared values in all three data sets. HU described this responsiveness in that "executive leadership within [the security department] would request things and […] we were there to […] make them smart about things."

In this example, the interdependence of an intelligence team's skills, systems, and strategy, and the influence of the team's external environment can be seen as skills, whether analytic skills, communication skills, or otherwise, are leveraged through systems (i.e., direct sharing with decision makers, collaboration, or peer review) in order to support overall strategy (i.e., supporting decision-maker needs). But equally, decision-maker needs dictate what type of information is collected and how it is shared. Similarly, shared team values, such as those described by Cameron and Quinn (2011), are influenced by the decision makers these teams are supporting and may also influence–and be influenced by–leadership styles. All of this is underpinned by the overarching goals of the team, which the strategy seeks to accomplish.

An additional example of this natural alignment and interdependence can be found in the highlighting of flat structures within all three data sets. Interview participants, questionnaire responses, and a review of intelligence team-related documents all revealed a focus on establishing a flat structure for these types of organizations. While many interview participants and questionnaire respondents often noted that their intelligence teams existed within a

hierarchical corporate structure, many of the managers and even those at the executive level saw themselves as practitioners first. In this sense, there appeared to be limited hierarchical delineation between a manager and an individual contributor because many in leadership roles retained analytic responsibilities in addition to providing day-to-day guidance for their teams. For interview participants, this type of leadership engagement was viewed positively, aligning well with a participative leadership style. According to BP, this style was demonstrated by checking on the team daily, regular meetings, and the leader's ability to know what each team member was working on at a given time. BP further clarified that they did not view this as "micromanaging," but rather as "actually knowing what your team [is] doing." BP added that this leadership style was "huge" because the leader was then better able to advocate for their team with more senior leadership. However, while leaders on these teams often viewed themselves as practitioners first, the participative nature of leadership engagement on the team indicates that leaders on intelligence teams were more focused on supporting individual contributors first, somewhat akin to servant or autonomy-supportive leadership, both of which focus on the growth and development of subordinates (Deci & Ryan, 1985; Greenleaf, 1970). This allowed for individual contributors to develop autonomy and competence (Deci & Ryan, 1985). The positive descriptions of leadership styles on these teams also indicated that these leaders typically encouraged and facilitated direct engagement between individual contributors and executive-level consumers wherever possible, rather than establishing a bureaucracy that stymied direct sharing with decision makers.

This participative approach also aligns well, both conceptually and in practice, with the shared value of teamwork and collaboration, which featured prominently in all three domains. According to the literature, this highly engaged, friendly work environment that is characterized

by personal relationships and defines success in the context of openness to the needs of the consumer is indicative of a clan culture (Cameron & Quinn, 2011). Clan cultures are known to attach significant value to teamwork, participation, and consensus (Cameron & Quinn, 2011). These attributes are also supportive of self-determination theory and highlight the value of relatedness (Deci & Ryan, 1985). Another key leadership attribute identified through this study, autonomy-supportive leadership, is also a key element of self-determination theory.

According to CA, this collaborative team environment was exemplified during their time on the team through mutual support across the team:

> So, I will tell you, one of the greatest things I experienced was the fact that everybody on [the intelligence team] said, "Hey, how can I help?" if something went down—if someone had a medical appointment or something, you know, was overwhelmed. Everyone stepped up to say, "Hey, what can we do for you?" so I thought that was phenomenal. It goes to show a cohesion and a culture of wanting to help and improve and take care of each other, which is fun. […] A rising tide floats all boats—we all succeed; we all succeed together. I think that was awesome.

Perhaps the most direct example of this interdependence is seen in the role of the producer and the consumer, wherein the intelligence producer crafts products that are aimed at directly responding to decisionmaker needs–and informing their decisions–while the consumer's needs directly influence the type of information being provided. This is seen in quotes like "intelligence has become indispensable to the decision-making process" (SL), and "the consumer who requested the product was responsible for making a decision" (CM), wherein the intelligence was influencing the decision maker. Meanwhile, HU described executive leadership

directing the type of information being provided by noting, “executive leadership would request things and we were there to make them smart about things.”

Further, interdependence could also be found in the relationships between staffing considerations and shared values. As the average size of these teams was comparatively small, with a median of 6 team members to cover a company’s global footprint, some companies opted to spend money on vendors and/or rely on relationship-building and networking skills, characterized as the “ability to engage internal and external stakeholders” (17) and “building bridges” (37). High levels of engagement are indicative of clan cultures, showing that, while these skills are perhaps necessary to have an outsized impact with a smaller team, teams have also come to value these skills, as personal relationships effectively define success. So, as professional networks and vendor relationships are seen as force multipliers, the values themselves become ingrained. An intel professional needs to be collaborative and engaging in order to network effectively, but the professional network can alter the size of team and/or type of skills needed on the team in order to accomplish its objectives. This overall alignment is a hallmark of an effective system, demonstrating how each of the elements is interconnected with—and influences—the others.

Conclusion 2: Equifinality in Intelligence Teams

In addition to the interdependence of many of the concepts within these systems, there was also some significant overlap demonstrating equifinality in geopolitically-focused private sector intelligence teams. According to Cummings and Worley (2016), equifinality means that firms may use substantially different competencies to establish similar competitive advantages. The competitive advantage for intelligence teams–and thus the common end state or goal–is supporting decision-maker needs–providing timely intelligence that mitigates uncertainty and

informs decisions, which has become both increasingly challenging and increasingly important in light of the evolving VUCA environment in which global businesses are operating.

Equifinality is seen within the differing processes and procedures (systems) that these teams employ in order to support their consumers as well as in the extent to which differing teams leverage vendor support. In both situations, the teams are seeking to best address their decision-maker needs, but how they have chosen to address those needs may differ in the type of resources put towards that objective. For example, the top consideration identified for systems in both the interviews and in the questionnaire was "direct sharing with consumers." This bears similarity to the themes of customer or business alignment, direct communication with consumers, and decision support, all of which were also prevalent under strategy. Similarly, the concepts of collaboration (shared values) and networking or relationship building (skills) both featured prominently and share many commonalities; collaboration also came up during discussions of structure and strategy. For example, when asked about the structure of the team, SL noted that the team was "very much a collaborative, think tank type environment where we tossed ideas around off each other" and that it was "less hierarchical and more flat." When asked about what the team was known for doing particularly well, GZ responded that it was known for "rolling up [their] sleeves" and being "a partner in the trenches [with the customer]."

These overlaps also impacted the initial anchor codes for some of the interview items and expanded the conceptualization of subquestion 2, which initially asked solely about the size of team that might be needed to adequately address the business requirements levied upon this type of team. Interview participants, however, highlighted a myriad of other capabilities that these teams leveraged which served as force multipliers, including collaboration, networking, internship programs, cross-functional teams, and relationships with vendors, meaning that a more

accurate and revised subquestion 2 was “What type of human and other resources might be required to adequately address the business requirements levied upon this team?” This also showed that actual staffing numbers and capabilities can be augmented by leveraging other elements of the system when necessary. The intentional leveraging other elements of a system highlights the concept of equifinality, given that there may be no optimal number of team members, so long as other capabilities can be brought to bear to address the business requirements that are levied on these types of teams.

Further, five of the interview items were recategorized, given the thrust of the responses during the pilot interviews. Interview items 5 and 6, which originally were designed to target systems, resulted in responses from interview participants that primarily fell under strategy. Item 5 asked how the team’s work was monitored and assessed, and item 6 asked about how the team received its tasks and met its requirements. The interviewer saw these items as a means of gaining an understanding of the processes and procedures employed by intelligence teams to do their work. However, responses to these items often addressed concepts like ad-hoc or self-generation of products, which fell under systems, and then subsequently moved into customer or business alignment and decision-making support, which fell under strategy. For example, BW noted that the team’s work consisted of:

> Tracking and monitoring geopolitical issues that might impact the [company's work], and then kind of translating those issues and concerns into assessments, both ones that were requested from like the customer, as well as ones that were kind of self-initiated by the team like, “Hey, we think this is going to be an issue [for the business].” So more like strategic ones; briefing decision makers as well. In addition to kind of like the written products, we had, I guess, like connecting with peers and other people in the industry to

> make sure that we were all benchmarking and on the same page, about the concerns we had about what was going on in the rest of the world.

Similarly, item 8, which was originally designed to address strategy, resulted in responses that instead targeted the topic of staff. The researcher initially intended to use the question to understand strategic resourcing considerations from a financial, training, and personnel standpoint, but responses instead highlighted the importance of relationships, including professional networks, internal business partnerships, cross-functional teams, and external vendors, to augment staffing numbers. According to PQ, oftentimes staffing resources even came out of budgets that weren't specifically dedicated to security or intelligence. "A security operations person […] had an operational budget that they were dedicated to spend towards," but sometimes funding would come from:

> Somebody similar within the business that didn't necessarily have security but had an overall operational budget. Like, if you were [an] event planner for FY23, you allocated a certain amount of your budget for security, right? And then it was the senior security person's job to help guide that allocation, ask for more if it wasn't enough, okay, or to do what we did, which is bringing in external resources that didn't get carried as a line item and spent way more […] than was actually billed back to the event.

Finally, items 9a and 13 both initially fell under the anchor codes for structure, but responses instead addressed processes and procedures (systems) utilized by the team. Item 9a, which queried about the lines of communication, both explicit and implicit within the team and externally, was intended to address whether team members were able to communicate directly with consumers or if such communication relied on title and hierarchy. Instead, however, participants highlighted the criticality of direct communication with consumers to how the work

was accomplished. This also addressed the need for a flat structure, as well as the importance of networking and relationship-building (skills) in understanding business requirements to directly address decision-maker needs (strategy). Because many of the respondents noted that while their team structure was flat, they existed within a hierarchical structure, it also highlighted the importance of intelligence professionals being titled and leveled (staff, structure) such that they are free to liaise directly with key decision makers (systems) in order to ensure timely sharing of information (shared values) directly from the subject matter expert (skills). Requiring intelligence products to go through numerous layers, whether horizontal silos or vertical hierarchy, to reach consumers was seen as challenging the concept of timeliness. When information is not provided in advance of a business decision, it does not effectively support the decision maker and may be irrelevant. Furthermore, if intelligence professionals are not able to liaise directly with the decision maker, their ability to understand and even anticipate the types of decisions their consumers are facing—and thus their ability to provide relevant and timely information—is significantly diminished.

Item 13 asked about informal organization within the team, originally designed to address informal structures that team members may have established to support their day-to-day work, based on specializations or skills that individuals brought to the table. However, responses to this item focused heavily on peer review, noting that team members regularly collaborated (a key shared value) and worked together to leverage any special knowledge or skills, rather than resulting in an informal structure. As HU described it:

> It was a tight group because it was highly collaborative. It led to better quality of product and service because you constantly had a team who was, you know, metaphorically and physically right there and just a high amount of idea generation, you know, bouncing

> questions or thoughts off each other. And those challenges really improved…the products and even when we got to more formal things like, you know, reviews of analyses before they went out, it was a very collaborative process. There was no "gotcha" there. It was really just trying to say, you know, are there other ways that we can improve this and make it better for the customer?[…]And look, I've seen it be very successful both ways. I've seen ones that I've seen intel programs that are more—I don't want to say antagonistic— but you know, where the culture is to challenge everything. What the amazing thing was about [The Global Company's intel team] was that we would challenge the assumptions; we challenged the language; we challenge the conclusions, but there was never the feeling that you were challenging the other person. It was always designed to kind of improve the product and service, and we didn't experience any issues that I'm aware of where people—I don't think I really generally got all that mad at my coworkers.

While recategorization of these items was necessary to best document the types of themes that they produced, rather than being problematic, the emergence of this overlap in coding highlighted the nature of an intelligence team as a system, wherein the system's parts are interrelated (Bertalanffy, 1972), and despite the boundary that separates it from its external environment, as an open system, there is a dynamic, ongoing, and ever-changing process of self-organization, growth, and adaptation, wherein the system exchanges information with and is influenced by its environment (Cummings & Worley, 2016; Montuori, 2011). The concept of equifinality explains these overlaps as necessary flexibility that can help organizations to achieve high performance, regardless of the contingencies they face. (Gresov & Drazin, 1997).

Conclusion 3: A Definition of Analytic Skills

For geopolitically-focused intelligence teams in the private sector, beyond the thorough study of a particular topic, research acumen, and critical thinking, analytic skills refer to the ability to analyze, synthesize and contextualize data for a decision maker or consumer. This definition embodies an ability to identify trustworthy sourcing and evaluate information sources for validity and relevance, going well beyond simple collation of data. This definition provides much needed clarity for the field as it seeks to determine what skills are most needed to employ on these teams, but perhaps more importantly, it demonstrates the validity of an open systems theory approach by putting the external consumer at the forefront of the core skills required on these teams. According to this definition, analysis is not an objective in and of itself, but rather a means to achieve an objective, as it is done in support of a decision-maker's needs. It also highlights the interdependence of each element of a system as an effective and well-defined strategy connects the skills needed and the everyday tasks to the overall objectives (Senge, 1990).

Across the private sector intelligence community, "analytic skills" were the most commonly cited requirement for these intelligence teams. Given that many intelligence practitioners are titled as analysts or have analysis as a core element of their job description (Robson, 2022), this is not surprising. However, this skill set had, to date, not been well-defined. A standard dictionary definition of analysis includes a "detailed examination of anything complex in order to understand its nature or to determine its essential features: a thorough study; a statement of such an examination; and a separation of a whole into its component parts" (Merriam-Webster, n.d.). This study found that when practitioners and security leaders involved in developing a framework for these teams make reference to analytic skills, they are often not

only referring to the thorough study of a particular topic, which was often embodied in concepts like “critical thinking” (CA, DS, SL) or “research skills” (SW, CM), but also the ability to synthesize large quantities of data and then contextualize that information for a specific audience.

GZ described synthesis and communication as critical to analysis within private sector intelligence teams, describing analytic skills as,

> the ability to take in all sorts of data, and … synthesize it in a way that it's … sort of a logical outcome. And then to communicate that very clearly, so you know, what do you think, why do you think it, what you know, what don't you know…being super super super clear is also really important. So, there's a lot of things … it was listening, it was putting yourself out there and networking, qualitative analysis, communication.”

GS similarly highlighted the importance of synthesis, noting that “clearly the ability to write clearly, synthesize, you know, analyze…is critical.”

BW addressed the need for contextualizing the information, commenting that decision makers valued these teams because they were people who were “watching [relevant] issues that could say, ‘oh, this is no big deal at all; this happens all the time’, or say ‘actually, this is heating up’, or ‘actually, this is cooling down’, so somebody who just had perspective. They also valued our ability to sort of translate it for them, and what it means, what it would mean for their business and potential security risks.” BW further explained that analytic skills required “understanding how to take all the different pieces of what you're seeing and formulate it into a coherent outlook and forecast, so that the decision maker kind of understands, ‘okay, here's, here are the trends right now. And here's kind of what we're forecasting based on XYZ’. So just being able to process a lot of data, and being able to say ‘so what?’” Similarly, HU noted that these

teams were charged with “providing a singular voice on kind of contextualizing what's going on in the world and why it might or might not be important for the company.”

Synthesizing and contextualizing information was also highlighted as a core competency in a document identifying The Global Company’s Intelligence Team Core Competencies. In the questionnaire responses, this contextualization was described as the “ability to determine when a risk is relevant to your company’s operations and what isn’t” (14). While the synthesis element of this definition of analytic skills is expected because it aligns with the overall definition of analysis as “a detailed examination of anything complex” (Merriam-Webster, n.d.), the contextualization element appears tied to business acumen—that is, understanding what is relevant to the business and how to frame the information in such a way that it addresses business needs and helps a decision maker. In this way, contextualization also takes into account the consumer of the information, understanding what decisions they may be facing, as well as in what format they like to consume information. Thus, while business acumen and communication skills were coded separately from analytic skills since they are also required in responsibilities separate from the provision of analysis, there is significant alignment in these requirements, as well.

These “analytic skills” appear at a high level on Bloom’s Taxonomy (Bloom et al., 1956) because they entail not only the basic level of knowledge acquisition through recognizing and remembering facts and basic concepts, and organizing, comparing, and interpreting ideas. They also entail using that knowledge to solve problems and identify connections and relationships and then synthesize information by using component pieces of information to form a cogent assessment, make judgements based on set criteria, and present and defend those stances (Anderson & Krathwohl, 2001; Bloom et al., 1956; Hoy 2007). It is important to note, however,

that analysis is not the only skill leveraged by these professionals, and they are often tasked with work that not only spans the full range of Bloom's Taxonomy, but also falls outside of the core description or definition of analytical skills, including, but not limited to, project or program management, serving in an advisory capacity, and incident alerting. For this reason, many intelligence professionals in the private sector have become dissatisfied with the "Analyst" title, arguing that it limits the understanding of the full gamut of work that these professionals do (Long & Mallard, 2021).

Conclusion 4: The Need for Clarity

While there was significant alignment across the various elements of McKinsey 7S within private sector intelligence teams, three primary challenges arose, which were tied to a significant lack of clarity in three areas: value proposition, strategy, and career paths for private sector intelligence professionals. The common thread across these three challenges was tied to a lack of clarity surrounding strategy, which hindered the operations of these intelligence teams and undermined efforts to achieve optimized equifinality. As interviewees and questionnaire respondents responded to questions about staffing, many individuals noted that the existence of their intelligence team was largely unknown outside of their direct business segment. This meant that while in some cases the intelligence team had become integral to the decision-making process, many potential consumers of intelligence were unaware of the team's existence or capabilities, and in some cases, they were unaware of what value they could bring to the decision-making process. Another challenge that arose surrounding the element of structure was that the career track for intelligence professionals is largely undefined. Although many of the skills identified as critical for intelligence professionals are transferrable to other fields, the nascency of the field and the differentiation in how their skills are used within the private sector

means that career paths are unclear and may be dependent on company or professional networking. Finally, it was found that while numerous elements of strategy were discussed throughout the interviews and questionnaire responses, there was a lack of clarity on an overarching strategy that was clear, specific, and well-articulated.

Unclear Value Proposition. Both interview participants and questionnaire respondents noted that one of the biggest challenges they faced was that many of their key intelligence consumers simply did not have a good understanding of what intelligence is or what value it can add to the decision-making process; in short, their value proposition was unclear. This played a prominent role in staffing challenges, as making the case for the utility of more intelligence relied heavily on scaling the capability to more consumers to support additional and more high-level decisions. This challenge presented most frequently when interview participants were asked about the team's reputation within the company, with respondents noting that the team was treated as a "curiosity" because the challenge is "having consumers who are educated enough about what intelligence can truly do for them" (DS). HU described the lack of understanding within the consumer base as follows:

> None of our customers know what we do, no matter how well you educate them, no matter how close you work with them. They are business people […] who know all these different things and they're experts at that and they have no frame of reference by which they can understand what you're doing.

GS further described the challenge as follows:

> You know, it was written products we produce, right you know, that went up to leadership, which was, you know, tends to be about the more geopolitical stuff and they weren't really reading, you know, the travel threat assessments that we were doing. They

> were reading the big picture stuff and again, they wanted, you know, a bomb went off. 10 minutes later, they want to, you know, Spot report on who did it and what it means and all that kind of stuff, which no one knew at the time. So, you know, we couldn't actually deliver what, you know, the most senior leaders wanted, and I could have made it up I suppose, or just watch CNN or BBC or something and said, you know, but to actually put something thoughtful together the fact that it takes time. Yeah, I was, you know, not something they appreciated or really wanted, you know, I really don't think, you know, […], they actually understand Strategic Intelligence. Yeah, you know, and so when they, you know, have an intel team, they don't have a clue what they've got, right? You know, it's like, you know, you race a thoroughbred in a quarter horse race or something. It's, you know, sort of vice versa. I'm not trying to be elitist, but you know, you developed a team that can give you long term […], thoughtful analysis of where a portion of the globe is going, and what you want is the tactical for what happened 10 minutes ago. Not at all the same things.

This lack of understanding of an intelligence team's value proposition was exacerbated by bureaucracy and silos, with many intelligence professionals at The Global Company and in the broader private sector intelligence community alike highlighting the challenge of getting the attention of key leaders and subsequently not knowing what decisions these leaders are facing, thus making intelligence production to meet those needs difficult at best. As GS noted, the intelligence team was often "trying to be sort of an answer in search of a question." Although many large organizations are increasingly leveraging these intelligence teams (Robson, 2022), the private sector intelligence community remains comparatively small, with personnel estimates in the range of 1,500 people (M. Robson, personal communication, June 28, 2021). Given that

the field remains in its nascent stages, and the number of practitioners is comparatively small in relation to the overall number of employees at MNEs, it is not surprising that there would be a lack of clarity on how leaders can best leverage this type of expertise, particularly for leaders who are unfamiliar with the intelligence field. It is also possible that misperceptions of the field and the work that these teams do may cause a reticence in some executives to leverage these capabilities, even if their value proposition is clear. Executives may fear that common public misperceptions of intelligence teams could cause brand or reputational risk to MNEs if they are perceived as leveraging intelligence teams as mercenaries or covert action elements, rather than in a business advisory or decision-support capacity. Organizations such as AIRIP and podcasts such as *The Business of Intelligence* have made a concerted effort to represent the capabilities of intelligence in the private sector, effectively "demystifying" the capability. These organizations have also leveraged webinars and publications to differentiate the field from many common misperceptions, such as covert action or industrial espionage.

According to Ard (2022), the private sector intelligence field has experienced around 5% annual growth. This is likely due in part to a surge in recognition for these teams, as many intelligence teams addressed COVID-19-related issues. Although most intelligence professionals are not epidemiologists, many teams demonstrated their relevance through their ability to provide timely and thorough information regarding the near-constant changes in pandemic-related restrictions and guidance. Many teams that effectively messaged their ability to be agile and shift their focus from standard geopolitical issues to provide critical information that had direct relevance to continued business operations during a time of heightened upheaval have found an increased consumer base. As the need for this information wanes, it is likely that in order to sustain this growth, teams may require increased support from executive sponsors who

can message the value of an intelligence capability to their peers at the senior leadership level in order to establish a consumer base that cuts across silos. In a world filled with an overabundance of information, messaging the value proposition of intelligence teams to key executives and corporate leaders will be critical to the field's growth. This growth will also largely depend on relationship-building and direct communication between intelligence producers and consumers to ensure that accurate and relevant information is shared in a timely fashion.

Lack of Clear Strategy. Many of the strategies identified by participants and respondents lacked specificity. Ideas such as "customer or business alignment," "decision support," and "resourcefulness" were described as the team's overarching strategy, though they were not further defined. Porter (1998) highlighted the need for strategy to consider the opportunities and threats within an industry alongside the strengths, weaknesses, and expectations of the organization. Many of the identified strategies are likely predicated on the expectations that executives have of intelligence practitioners but do not lay out a set of coherent actions that will take an intelligence team to achieve its objective. Strategy should give direction to the team in its effort to achieve its overall mission. For strategy to be effective, it must be more than a broad theme; it must have enough specificity to guide the actions of the team (Kouzes & Posner, 2011).

Based on the interviews, questionnaire responses, and document review, it was clear that one overarching element of strategy was to provide decision-making support, though how these teams establish the capability to provide this support was only indirectly addressed. For example, BP noted that the team sought to "inform our decision makers so they can make business decisions." CA described decision-making support in terms of priority intelligence requirements (PIR), noting that the requirement was "so important for decision makers; they want to know [the

information] so they can make a decision, so you focus your efforts on answering that PIR." According to GZ, this decision-making support was based on an intelligence professional's role as a "strategic advisor" as the team provided "qualitative insights." Based on these comments, it can be extrapolated that these qualitative insights that were leveraged in decision-making support were based on some level of specialized insight or knowledge, a reference to an intelligence professional's subject matter expertise and their ability to contextualize information through their business acumen. Thus, the strategy of an intelligence team is largely embedded in the skills and capabilities of the individual team members.

Although support to consumers was clearly identified as an objective for these teams, noticeably absent in all three data collection domains was any formalized consumer feedback mechanism. While there were references to "direct communication with consumers", there was no clarity in how consumers might be guided to provide the insights necessary to best support their needs. This absence likely challenges the ability of these teams to leverage feedback to effectively refine their products amidst changing consumer needs. It was also evident that private sector intelligence professionals use the changing geopolitical context and a company's organizational context as a form of feedback to alter their focus in order to ensure that they are providing the most timely and relevant information possible. While this iterative approach may not necessarily influence the broader geopolitical context, it clearly aims to alter the company's operations within this context, and thus influence how the company interacts with its external environment, thereby completing the feedback loop. A more formalized feedback mechanism, to ensure that customer perceptions and needs are being effectively captured, would likely provide greater clarity into the generation of intelligence requirements in the private sector.

A private sector intelligence team's ability to accomplish its objectives is also based on how individual skills are leveraged toward the team's goals. Further, because the ability to inform a decision maker is largely dependent on access to that decision maker, in addition to subject matter expertise and business acumen, relationship-building skills are critical to a private sector intelligence team's strategy, as well. Given that many of these teams face challenges in messaging their value proposition, and the criticality of relationship-building, business acumen, and subject matter expertise, issues such as constant turnover and loss of institutional knowledge undermine an intelligence team's strategy, as relationships have to be re-built and subject matter expertise and business acumen re-established. A long-term strategy for an intelligence team would likely need to understand how to evolve individual capabilities to address the changing needs of intelligence consumers while leveraging existing skills and capabilities (Kouzes & Posner, 2011; Senge, 1990).

Lack of a defined career path. The retention of institutional knowledge in the field is also tied to the concepts of direction and growth. BP noted that one of the deficiencies on the team was in "being able to maintain talent and grow talent from within." They further noted that the intelligence team was often seen as a "talent pool for other departments," making the team constantly at risk of losing institutional knowledge, and unable to leverage long-standing relationships to maintain a seat at the table. BW noted that while there were different titles on the team at the analyst and senior analyst level, "there was not really much of a difference in the workload between the analyst and senior analyst." BW added that they were unsure as to whether HR had any processes for promotion and adding responsibilities to move to the next level, and that if they did, they "didn't communicate that with everyone…nobody really was transparent about what it took to get promoted." GS concurred, noting that there

> wasn't a whole lot of thought put into a career track…the people who've been in the longest needed to be given additional experience and responsibilities and figure out what they were going to do next, because nobody there was going to be in that same job for 30 years before [they] might or might not get bumped up to be the director because the director was usually somebody in their late 50's. Early 60's…It's just crazy to think those people are going to sit there for 30 years…so there needed to be a plan.

It is unclear to what extent the lack of defined career path may be problematic across the broader private sector intelligence community, though according to Robson (2022), private sector intelligence has not yet achieved the distinction of being a full-fledged profession, though it "exhibits several of the indicators of being more of a 'craft' than a profession, notably through the reliance on 'the skill of the individual practitioner'" (31). The nascency of the field means that it lacks an accepted set of standards or a robust body of existing knowledge from which to educate new practitioners (Marrin, 2013). Given the lack of standards and career direction in the community more broadly, growth opportunities appear to be primarily left to the individual practitioner and their specific organization to navigate.

The lack of a defined career path for private sector intelligence professionals is likely tied to the lack of clear strategy that many of these teams face. There is a natural tension between the desire for flatter structures for increased efficacy and the ability for intelligence professionals to progress into roles of increasing seniority, though through autonomy-supportive leadership, leaders can provide opportunities to progress in responsibility. However, the strategy for a private sector intelligence team is largely based on the leveraging of individual and group skills and capabilities to address short and long-term decision-maker requirements. Thus, a lack of strategy for how a team will evolve to address longer-term and increasingly complex objectives

on behalf of the company likely undermines longer-term personnel planning and related professional or skills development.

Notably, the common thread in all three of these challenges to intelligence teams operations is a lack of clarity surrounding an intelligence team's overarching strategy. Messaging a team's value proposition is heavily dependent on understanding and delivering on decision-maker expectations. In order to provide support to decision makers, it is critical for these teams to ensure that their work is aligned with these executives' highest priorities. To do so, there must be a well-defined strategy to connects long-term objectives to daily tasks (Senge, 1990). Similarly, a well-defined strategy would consider career development for intelligence professionals with a plan to evolve individual capabilities to address the changing needs of intelligence consumers while leveraging existing skills and capabilities. A clear strategy would not only help with establishing the value proposition an intelligence team and consider future professional development, but it would also connect the current components of a system so that all elements are aligned toward optimization in the present, as well as in the future, regardless of internal constraints and resources. Most importantly, a sound strategy helps a team to effectively adapt to and integrate with its external context, supporting an open systems approach and achieving optimized equifinality.

Implications

This study presents a multitude of implications for building and leveraging intelligence teams in the private sector as seen through a systems theory lens. As established by Beven (2006) and Bertalanffy (1972), the objective of a systems approach is to use one system's dynamics, constraints, and conditions to develop principles that can be applied more broadly to other systems. Thus, while the objective of this study was not to identify a single perfect

framework for building and leveraging an intelligence team in the private sector, there are many considerations that can be taken into account in seeking an optimal result for each individual case.

As Robson (2022) found, the private sector intelligence field is on the path towards professionalization, but it does not yet have many of the key attributes of a profession, including a certification process. This study similarly found that while there is some commonality, both within individual teams and across the community, the skills expected of private sector intelligence practitioners often fall in areas that are difficult to certify or document. For example, although it is possible to document knowledge of structured analytic techniques, such as "red hat analysis" or "analysis of competing hypotheses," these are tools rather than overarching skill sets, and they may or may not be useful in each situation. A certification to document mastery in the critical skills identified for intelligence practitioners would be difficult to develop because the capabilities these professionals need for success tend to rely on soft skills and are often situation-dependent or differ from organization to organization. Thus, the concept of equifinality—that firms may use substantially different competencies to establish similar competitive advantages (Cummings & Worley, 2016)—has a clear application for private sector intelligence teams. However, as Beven (2006) noted, the degree to which a system adapts will depend on how well the system is engaged with its environment. Because intelligence teams as systems are heavily dependent on successfully supporting decision-making consumers, and because these consumers are typically outside of the system, the engagement of intelligence teams with their external corporate environment will be critical to their success.

An intelligence team's engagement with its external environment may take many different forms, depending on the firm, but the need for these teams to adapt to the inputs of the

external consumers underscores the importance of a flat structure and direct communication with consumers. This direct communication, however, must be clear and concise to adequately support decision makers, demonstrating an understanding of the time constraints many executive decision makers are under. It also highlights the need for intelligence professionals to have an aptitude for professional networking, not only to establish relationships with consumers in order to solicit requirements, but also to encourage and benefit from collaborative opportunities and to serve as a force-multiplier. Networking and collaboration are also critical to addressing one of the key challenges that intelligence professionals face: the lack of understanding surrounding their value proposition.

Organizational theorists have suggested that how an organization's human resources are allocated to meet its objectives has a significant impact on the behavior of the individuals within the organization (Nahavandi et al., 2015). Because these teams tend to be smaller in scale, with a median of six members, it is likely that this encourages collaboration and teamwork and reinforces the need for leaders to be participative and actively engaged in the work of the team. Because many of the professionals on these teams tend to have a geographic focus or regional subject matter expertise, individuals are likely compelled to establish knowledge over an entire continent or large area of operations, as the number of people to cover a company's operational footprint is comparatively small. This also results in the leveraging of expertise from professional networks and vendor organizations and can require creativity and innovation to tackle large problems with comparatively few human resources.

Further, this study found that there is an apparent acceptance of the VUCA geopolitical environment in which most intelligence teams operate and the relative independence with which they operate. According to Galbraith (1998), the amount of coordination required within a

structure is a function of the amount of uncertainty in the environment, the differentiation between the subunits, and the degree to which the subunits are interdependent. As each of these elements increases, more sophisticated systems for coordination are required. Despite the highly volatile geopolitical environment, many of the systems identified by the intelligence team were basic in nature, including peer review, basic project tracking, and direct communication. Given that these are not highly sophisticated systems, it appears that either there is a mitigating factor undermining the need for sophisticated systems, or more likely, the need for this type of coordination exists, but such systems have not yet been developed.

Finally, from a practical standpoint, many leaders who are tasked with building these teams are new to the private sector and may not have a thorough understanding of the business leaders that their intelligence team will be supporting. In order for these intelligence teams to be successful, those who are developing and evolving intelligence teams in the private sector must begin by understanding the decisions–and decision makers–that they will be supporting. Because the needs of these decision makers will differ by industry, sector, experience level, or myriad other considerations, support to these decision makers is indicative of optimized equifinality.

After developing support from these key consumers, a strategy can be developed that will inform all other aspects of the system, including staffing, skills, shared values, systems, leadership styles, and structure. Many leaders of these teams first start with a vague notion of the required skills and build a simple structure to support those skills, or start with the personnel available to them and implement systems to ensure that they do the required work, but without an effective strategy, the program cannot move forward. Once this strategy is in place, it can connect the day-to-day analytic work with the overarching objectives, serve as a framework for the continued evolution of the team, help to identify the optimal structure to support a specific

organization's needs, and streamline processes so that they support, rather than hinder, the work being done. Most importantly, this strategy should be informed by decision-maker needs, meaning that it will likely be derived from a requirements-generation process that both drives the creation of intelligence analysis that directly addresses decision-maker needs and also incorporates feedback from consumers to continually refine and optimize intelligence production.

Opportunities for the Academic Field

Given the increasing number of undergraduate- and graduate-level programs geared towards intelligence studies (Lowenthal, 2017b), understanding the opportunities that exist on private sector intelligence teams and the skills that they most need to employ will allow program directors, professors, and students to target their studies more accurately and efficiently to build the capabilities needed to thrive in these environments. This study's implications for academic scholarship are heavily focused in the area of skills development. When asked how leaders sought to develop the professionals on private sector intelligence teams, many respondents mentioned external training opportunities or autonomy-supportive leadership practices. There was noticeably no mention of internal skills development or training specific to those skills needed for these professionals to be successful on these teams. This gap presents a significant opportunity for academic scholarship, particularly as these academic programs develop.

Many of these programs address specific tools, such as structured analytic techniques, or aim to help students develop their critical thinking skills. However, adding the employment of these skills to a business context or including additional educational content to build a foundation for establishing business acumen will allow these students to have a framework that will aid in their success in the private sector business context. Further scholarship on how to develop these

skills in students will support the integration of these individuals into roles in the private sector. Another topic of relevance for these academic programs is program management or program development, which is a critical skill in both the public and the private sector and aligns well with developing business acumen. Leadership skills also featured prominently in the necessary skills for private sector intelligence professionals. Many programs that focus on developing leadership skills also address the self-awareness and other "soft skills" needed to build and develop relationships and work effectively on teams. As such, including an enhanced focus on these topics in intelligence studies programs will help students to have a more well-rounded skill set that will be appealing to future employers in the private sector. It also presents opportunities for further study to ascertain the extent to which all of these skills are valued in the public sector and whether similar training could also be leveraged for those intending to go into the public sector. These programs are also poised to fill a critical gap for private sector employers and the field as a whole. Given limited mention of "in house" leadership and skills development programs for intelligence professionals within the private sector, further developing these academic programs to cater to existing and early-career private sector intelligence professionals may present a more holistic answer to the question surrounding certification and credentialing.

Recommendations for Future Research

This inquiry employed a narrow definition of intelligence teams, situating the study within the private sector, geopolitical space, and looked specifically at these teams in MNEs. However, these types of teams are also present in some nonprofit organizations where funding and resources can be an additional challenge. As such, understanding how these teams are employed within the nonprofit space to support non-governmental organizations would add a significant building block to the understanding of the private sector intelligence space. Further,

several intelligence professionals focus their expertise in adjacent areas, such as cybersecurity and business, competitive, or financial intelligence. Understanding how the concepts and themes derived from this study may be relevant to these adjacent fields would also help to build a broader understanding of a private sector intelligence capability and how it can be leveraged in different contexts. Another avenue may be to take a quantitative approach, looking for correlation between various elements within systems theory, further investigating the nature and extent of alignment within the system and, in particular, between individual elements. Further, this study specifically leveraged a systems theory lens to explain the operations of private sector intelligence teams. However, other theoretical frameworks, including risk management theory, risk mitigation theory, organizational development theory, or critical theory of technology may also be relevant in understanding this field.

This study also looked specifically at these teams using a case study methodology as viewed through a systems theory lens, specifically leveraging the McKinsey 7S framework, though other frameworks may have yielded additional or differing insights. For example, a phenomenological approach interviewing many private sector intelligence professionals may give greater insight into the lived experiences of these professionals on a broader scale. From another perspective, a large-scale document review of job descriptions for private sector intelligence roles may yield additional skills or qualifications that private sector firms value beyond those documented as a part of this study. Further, because the overall population for this case study was small, it was difficult to analyze any differentiation in perspectives between executives and individual contributors. A study focusing on this differentiation, if any, may be relevant in understanding how these teams express their value proposition to senior audiences through leveraging the executive leadership on their teams or within their hierarchy.

While the concept of staffing did highlight that both interview participants and questionnaire respondents saw regional or cultural expertise as an asset, cultural agility and cross-cultural leadership skills were not further discussed within the context of this study. In particular, the interview participants were all based in the United States, and while they interacted regularly with fellow employees in different countries, they were not responsible for day-to-day direct oversight of these individuals, and The Global Company's intelligence team leadership did not have direct reports based outside the United States. Similarly, this topic did not come up as a significant factor within the questionnaire, though the nature of dealing with geopolitical expertise lends itself to a multicultural field wherein cultural agility and cross-cultural leadership may play a more significant role than that identified in this study. The topic of international travel did come up in the interviews, and it was primarily addressed in the context of building relationships with international executives and in building subject matter expertise. Caligiuri and Tarique (2012) identify international travel and exposure to new cultures as one mechanism for building cultural agility. A study at the intersection of cultural agility and subject matter expertise for intelligence professionals may assist in understanding the efficacy with which international travel can build these skills.

Finally, this study found that there was significant alignment and even some overlap in themes, establishing a fluidity within the system as concepts flowed together across the McKinsey 7S framework. This overlap highlighted the ability to leverage different parts of a system to augment gaps—for example, leveraging collaboration and professional networks to address staffing shortages. The ability to leverage different parts of the system to address deficiencies is a hallmark of equifinality, as the end result is the objective. However, this does not indicate when a system is out of alignment or when it may be approaching misalignment.

Further study to establish parameters around optimization in each of these categories may help to avoid staffing shortages, a lack of access to critical information, or underleveraging of intelligence capabilities.

Evaluation

This study came at a point in my career where I was shifting gears and moving into an adjacent field as a newly-minted executive, so in many respects, it has served to coalesce my work as a practitioner over the past two decades, helping me to synthesize much of what I have learned as a practitioner in light of the literature. It also helped to inform my work over the past three years as a leader of a private sector intelligence team. This study also helped me to leverage my own analytic skills in a new way through understanding intelligence teams as systems: a framework that can be applied in myriad other contexts. Understanding this framework has also, I believe, prepared me for a new professional journey; for this, I am thankful. There is so much more work to be done to map this field, but through this study, a new portion of the field has been illuminated, and the aperture has been widened.

While frustrating at times, one of the key elements of this study, for me, was reflexivity. I have been deeply ingrained in the private sector intelligence field for the past five and a half years, and I have, until recently, spent the entirety of my professional career in the broader intelligence field. Thus, I have had many impassioned and deeply held beliefs about what works and what does not work within the field. I found that holding my own beliefs and perspectives in abeyance to accept and integrate the perceptions of others was actually a relief, in many ways, as I recognized that I was not alone in thinking critically about the field and its direction. The subject matter also led me to join forces with two other scholar-practitioners. Together, we formed a mini cohort, messaging each other daily as friends and fellow academics. Not only did I

fall in love with my own data, but I fell in love with their data as well, as we each brought a unique perspective to building knowledge about the private sector intelligence field.

Finally, I found the coding to be both intriguing and challenging, given so much overlap between the themes. While it helped that this reinforced the concept of equifinality, the lack of clearly defined lines between the categories, and the regularity with which internal elements within a system can leverage other elements to ameliorate deficiencies made it difficult to establish firm boundaries between anchor codes. Despite building a strong code book and being able to achieve 90% intercoder reliability through these definitions and examples, I still believed that separate coders with even slightly different backgrounds could easily have made a case for many of the codes to fall into different categories.

I think there were a number of different directions this study could have taken. For one, I would have liked to have had a greater focus on Cultural Agility and its role in leadership development for these teams. The systems theory approach provided a number of findings that touched on each element of the McKinsey 7S framework, but there is ample room to study each element individually and in-depth. If I were to re-scope the study, I would have focused more intensely on the leadership aspect, perhaps by using a phenomenological approach with the broader private sector intelligence community, while eliminating the individual case study. I believe that the proximity of intelligence professionals to leadership decisions and the global nature of the role provide the potential for geopolitically-focused intelligence professionals to rise into executive leadership roles. As such, understanding how leadership development can be implemented in this field will be an important step for the field as it moves towards professionalization. I intend to address this leadership development through future research into the role of self-determination theory in the private sector intelligence field. Further, though

challenging from an access standpoint, I am exploring the viability of conducting a similar study in the public sector. Such a study may have implications for developing effective leadership frameworks and improving recruitment and retention. It may also provide insights for executives within the government that would assist in optimizing intelligence functions

This study also found that many of the concepts or themes identified by participants and respondents as strategy were very loosely defined and responsive in nature. Ideas such as "customer or business alignment," "decision support," and "resourcefulness" clearly serve as elements of strategy but lack refinement or specificity. Some participants and respondents discussed requirements, also known as "priority intelligence requirements" or PIRs, which are a critical element in public sector intelligence, but there was limited discussion regarding what these are or how they are created in the private sector. It is likely that these intelligence requirements factor heavily into "business alignment" and "decision support" (strategy) and also guide the "ad hoc or self-generated" (systems) mentioned by a number of participants and respondents. Although this topic went beyond the scope of this study, understanding the nature of intelligence requirements in the private sector—including how they are generated and by whom—would likely shed significant light onto how strategy is defined and how it is developed within these teams. As such, I am currently involved in separate research within the private sector intelligence field to understand the role of feedback mechanisms and the requirements development process in building strategy for private sector intelligence teams.

Chapter Summary

This chapter provided a discussion of the outcomes of the research and identified nine key findings that demonstrate the applicability of a systems theory approach in understanding how geopolitically-focused intelligence teams operate in the private sector. These findings

highlighted challenges that exist in developing a private sector intelligence team's value proposition for executives; the importance of analytic and communication skills for private sector intelligence teams, the efficacy of a flat structure for sharing intelligence directly with decision makers, the importance of resourcefulness, adaptability, and flexibility in order to address decision-maker requirements; shared values of collaboration and teamwork within these teams, the utility of professional networks and vendors as force multipliers to augment headcount; the value of autonomy-supportive leadership in leading these teams; and the criticality of a clear strategy and direct communication with decision makers to an intelligence team's operational effectiveness.

This study's findings were further synthesized into four key conclusions, which further explained how these teams operate. The first conclusion demonstrated the alignment of intelligence teams as open systems, highlighting the influence that the external context has on their operations and identifying numerous examples of interdependence and equifinality on these teams. The second conclusion defined equifinality–a key systems theory concept–within intelligence teams, noting that these firms may use substantially different competencies to establish similar competitive advantages despite their common objective to support decision-maker needs. The third conclusion provided a definition of analytic skills, which have been identified as critical to success in this field as the core function of these teams, but had not previously been clearly defined. The final conclusion established the challenge posed to these teams' operations by a lack of clarity in three distinct areas: a team's value proposition, individual career paths, and the overall intelligence team strategy. This chapter also leveraged the literature to describe both the implications for practice and scholarship and identified opportunities for academia to fill gaps in knowledge and skills development and provided

recommendations for further research. This chapter concluded with the researcher's first-person comments and reflections.

Global businesses will continue to face challenges in a volatile and changing international context. One competitive advantage that can help these businesses to thrive in this increasingly challenging environment is a geopolitically-focused intelligence team. However, messaging intelligence teams' value propositions and developing sound strategy are critical to an intelligence team's ability to support high-level business decision making. **As a result of this study, it is clear that an open systems theory approach is effective in understanding how geopolitically-focused intelligence teams operate in the private sector to address this VUCA context through optimized equifinality. By leveraging an effective and well-articulated strategy that incorporates detailed requirements and feedback, these teams can utilize differing capabilities and resources to achieve the same objective–optimizing support to decision makers.**

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APPENDIX A

Informed Consent Form – Interviews

Informed Consent Form for Interview
Based on the IRB Template for Web or Email-based Informed Consent

IRB #: 21-07-1621

Study Title: Thriving in a VUCA World: A Case Study Exploring Geopolitically-Focused Intelligence Teams in the Private Sector through a Systems Theory Lens

Dear [Name],

My name is Angela Lewis. I am conducting a study on building and leveraging intelligence teams in the private sector. Because this is a research project that focuses on the private sector intelligence profession, in order to participate, you must be 19 years of age or older and have previously served as a member of The Global Company's geopolitically-focused intelligence team.

What is the reason for doing this research study?

The purpose of this global case study is to understand, through a systems theory lens, the components associated with the building and leveraging of geopolitically-focused intelligence teams by U.S.-based private sector multinational enterprises (MNEs). For this study, a private sector intelligence team is defined as a team that is focused on global issues such as crime, terrorism, or economic or political stability and seeks to provide strategic analytic insights to business leaders to aid in decision-making. A geopolitical focus is defined as addressing how political power is undermined or reinforced by practical decisions by political and social leaders within geographical boundaries and networks. As such, key geopolitical issues typically include political and economic stability, terrorism, crime, and civil unrest, amongst others.

What will be done during this research study?

Participation in this study will require approximately one hour. You will be asked to participate in a semi-structured interview by responding to a number of interview prompts. Participation will take place via Zoom.

What are the possible risks of being in this research study?

The risks associated with participation in this study are expected to be minimal, but may include discomfort in responding to items if the response is critical of The Global Company or boredom with a line of questioning that may not align with your interests. Zoom fatigue is also possible, as well as anxiety over the confidentiality of responses. Interviewees may opt out of any portion of the study at any time, for any reason. All items are optional.

What are the possible benefits to you?

This study will contribute to the growth and development of the private sector intelligence profession. Improved leveraging of intelligence in the private sector will allow for improved decision-making at senior corporate levels and enhance security, both domestically and abroad, for private-sector organizations. This, in turn, may lead to enhanced economic growth and corporate responsibility, leading to increased stature and improved financial prospects for individuals within the field. Stronger leaders with a background in cross-cultural affairs will improve organizational culture and enhance business efficacy in an increasingly globalized world. This improved leadership in the field of private sector intelligence could directly benefit participants due to an improved work environment for participants. Because the field is relatively nascent, this study will also provide a voice for interviewees who function in a profession that has been under-studied and may not be not well-understood.

How will information about you be protected?

Your responses to interview items will remain confidential during and after the interviews. To mitigate risk and protect the identity of all participants, pseudonyms will be employed during each stage of research, including the reporting of research results and findings. No other specific identifying information will be reported in the study, including organization names or specific locations. The identity of interviewees will be known only to the principal investigator, and the data and identifying information (including recorded interviews, transcriptions, notes, and coding worksheets) will only be collected and analyzed by – and available to – the principal investigator. All data will be secured on the principal investigator's password-protected and encrypted laptop computer and on a password-protected, encrypted cloud drive. All cloud folders will be used only for this research project and will be deleted within 3 years of the study's completion. Paper notes, files, and worksheets will be destroyed immediately after the study concludes.

What are your rights as a research subject?

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 Angela Lewis via email at angela.lewis@pepperdine.edu.

For questions concerning your rights or complaints about the research contact the Institutional Review Board (IRB):

- Phone: 1(310)568-2305

- Email: gpsirb@pepperdine.edu

What will happen if you decide not to be in this research study or decide to stop participating once you start?

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 will not lose any benefits to which you are entitled.

Documentation of Informed Consent

You are voluntarily making a decision whether or not to participate in this research study. By participating in the interview, you are giving your consent to participate in this research. You should print a copy of this page for your records.

APPENDIX B

Informed Consent Form – Questionnaire

Informed Consent Form for Questionnaire

IRB Number # 21-07-1621

Study Title: Thriving in a VUCA World: A Case Study Exploring Geopolitically-Focused Intelligence Teams in the Private Sector through a Systems Theory Lens

Invitation

Dear Prospective Participant,

I am conducting a study on building and leveraging intelligence teams in the private sector. Because this is a research project that focuses on the private sector intelligence profession, in order to participate you must be 19 years of age or older and a geopolitically-focused private sector intelligence professional.

What is the reason for doing this research study?

The purpose of this global case study is to understand, through a systems theory lens, the components that go into the building and leveraging of geopolitically-focused intelligence teams by U.S.-based private sector multinational enterprises (MNEs). For this study, a private sector intelligence team is defined as a team that is focused on global issues such as crime, terrorism, or economic or political stability and seeks to provide strategic analytic insights to business leaders to aid in decision-making. A geopolitical focus is defined as addressing how political power is undermined or reinforced by practical decisions by political and social leaders within geographical boundaries and networks. As such, key geopolitical issues typically include political and economic stability, terrorism, crime, and civil unrest, amongst others.

What will be done during this research study?

Participation in this study will require approximately 15 minutes. You will be asked to respond to a 10-question qualitative questionnaire which allows for open-text responses.

What are the possible risks of being in this research study?

As the private sector intelligence field is still in the nascent stages of professionalization, some respondents may feel frustration with the broad nature of the questionnaire topics. Participants

may also experience boredom with a line of questioning that does not align with their interests or appear to yield immediate benefits. Respondents may face a level of "survey fatigue," given that there have been a number of recent surveys and questionnaires deployed within a small number of professional networking groups. Finally, participants may experience some anxiety regarding a potential breach of anonymity which could impact their job or standing within the organization or private sector intelligence community. Participants may opt-out of any portion of the questionnaire at any time, for any reason, and participation is entirely optional. No identifying data is being collected, and pseudonyms will be employed throughout the study to mitigate the risk of exposure.

What are the possible benefits to you?

This study will contribute to the growth and development of the private sector intelligence field. Improved leveraging of intelligence in the private sector will allow for improved decision-making at senior corporate levels and enhance security, both domestically and abroad, for private-sector organizations. This, in turn, may lead to enhanced economic growth and corporate responsibility, leading to increased stature and improved financial prospects for individuals within the field. Stronger leaders with a background in cross-cultural affairs will improve organizational culture and enhance business efficacy in an increasingly globalized world. This improved leadership in the field of private sector intelligence could directly benefit participants due to an improved work environment for participants. Because the field is relatively nascent, this study will also provide a voice for interviewees who function in a profession that has been under-studied and may not be not well-understood.

How will information about you be protected?

Your responses to the questionnaire will remain anonymous throughout this research study. To mitigate risk and protect the identity of all participants, no identifying data will be collected for the questionnaire, and where direct quotes are used in reporting research results and findings, pseudonyms will be employed during each stage of research, including the reporting of research results and findings. All data will be secured on the principal investigator's password-protected and encrypted laptop computer and on a password-protected, encrypted cloud drive. All cloud folders will be used only for this research project and will be deleted within 3 years of the study's completion. Paper notes, files, and worksheets will be destroyed immediately after the study concludes.

What are your rights as a research subject?

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 principal investigator(s), Angela Lewis, at angela.lewis@pepperdine.edu

For questions concerning your rights or complaints about the research contact the Institutional Review Board (IRB):

- Phone: 1(310)568-2305
- Email: gpsirb@pepperdine.edu

What will happen if you decide not to be in this research study or decide to stop participating once you start?

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 will not lose any benefits to which you are entitled.

Documentation of Informed Consent

You are voluntarily making a decision whether or not to participate in this research study. By completing and submitting your survey responses, you have given your consent to participate in this research. You should print a copy of this page for your records.

APPENDIX C

Recruitment Letter for Interview

PEPPERDINE
UNIVERSITY

Written Recruitment Script

Dear [Name],

My name is Angela Lewis, and I am a doctoral student in the Graduate School of Education and Psychology at Pepperdine University. I am conducting a research study examining building and leveraging intelligence teams in the private sector, and you are invited to participate in the study. If you agree, you are invited to participate in an interview regarding your experiences as a private sector intelligence professional.

The interview is anticipated to take no more than one hour and will be conducted via Zoom. The interview will be audio recorded for reference and coding purposes. Participation in this study is voluntary. Your identity as a participant will remain confidential during and after the study. To protect the identity of all participants, pseudonyms will be employed during each stage of research, including the reporting of research results and findings. No other specific identifying information will be reported in the study, including organization names or specific locations. The identity of the human subjects will be known only to the principal investigator, and the data and identifying information (including recorded interviews, transcriptions, notes, and coding worksheets) will only be collected and analyzed and available to the principal investigator, though de-identified data may be provided to a second coder to ensure inter-coder reliability.

If you have questions or would like to participate, please contact me at angela.lewis@pepperdine.edu.

Thank you for your participation,

Angela Lewis
Pepperdine University
Graduate School of Education and Psychology
Doctoral Student

APPENDIX D

IRB Approval

Pepperdine University
24255 Pacific Coast Highway
Malibu, CA 90263
TEL: 310-506-4000

Date: August 19, 2021

Protocol Investigator Name: Angela Lewis

Protocol #: 21-07-1621

NOTICE OF APPROVAL FOR HUMAN RESEARCH

Project Title: THRIVING IN A VUCA WORLD: A CASE STUDY EXPLORING GEOPOLITICALLY-FOCUSED INTELLIGENCE TEAMS IN THE PRIVATE SECTOR THROUGH A SYSTEMS THEORY LENS

School: Graduate School of Education and Psychology

Dear Angela Lewis:

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 E

Mapping Tool

McKinsey 7s	Research Subquestion	Questionnaire	Interview Protocol	Document Review
Structure	SQ4: What considerations could be taken into account when developing a private-sector intelligence team's structure?	QQ6. How is your team structured?	Items 9, 10, 11	Organizational Charts
Systems	SQ5: What systems or processes could be put in place to best leverage a private-sector intelligence team?	QQ4. How does your team receive its taskings? QQ7. What processes or procedures are associated with the day-to-day internal operations of the team, including tracking projects, coordination, etc.?	Items 7, 9a, 13, 14, 15	Standard Operating Procedures
Strategy	SQ3: What elements might need to be considered in developing a strategy for a private-sector intelligence team?	QQ5. How does your team address intelligence requirements?	Items 1, 2, 5, 6	Best Practices, Job Descriptions, Organizational Charts, Standard Operating Procedures
Shared Values	SQ6: What elements of organizational culture could be accounted for when developing a private-sector intelligence team?	QQ8. What values do you see employed by your team?	Items 16, 17, 18	Best Practices
Style	SQ7: What leadership approaches might be best suited to the growth and development of a private-sector intelligence team?	QQ9. How does your team's leadership employ professional and/or skills development on your team?	Items 12, 19, 20	Job Descriptions, Standard Operating Procedures, Organizational Charts
Staff	SQ2: What type of human and other resources might be required to adequately address the business requirements levied upon this type of team?	QQ2: What is the size of your team? QQ3: What positions or specializations are present on your team?	Items 8, 11a	Job Descriptions
Skills	SQ1: What knowledge, skills, and abilities might need to be present on this type of team?	QQ1: What skills or competencies do you believe are most necessary for a private sector intelligence team to employ?	Items 3, 4, 8a	Job Descriptions

APPENDIX F

Interview Protocol

1. During your time with the intelligence team, what did you see as the team's purpose? [strategy]
    a. What were the team's primary responsibilities in light of this purpose?
2. During your time with the intelligence team, what were the core geopolitical/global issues that you (specifically) and the team (more broadly) were responsible for? [strategy]
    a. What, if any, major geopolitical incidents occurred during your time with the team that altered the team's responsibilities?
3. What skills or competencies do you believe were most necessary for the team to employ? [skills]
    a. What, if any, gaps existed in skills or competencies during your time on the team?
4. What do you believe the team's reputation was within the company? What was it known for doing well, and what were its deficiencies? [skills]
5. During your time with the team, how, if at all, was the team's work monitored and assessed? [strategy]
6. During your time with the team, how did the team receive its taskings and how did it meet those requirements? [strategy]
    a. How, if at all, was the team's strategy adjusted to account for evolving requirements?
7. In your experience, who were the primary consumers of the intel team's products? [systems]

   a. What value do you believe these stakeholders found in the team's products?
   b. Which consumers, if any, do you believe should have been a part of the team's customer base that were not?

8. How well was the team resourced as far as financial, training, personnel, and/or vendor resources and skills to do the job? [staff]
   a. What, if any, opportunities existed for professional or skills development within the team? [skills]
9. During your time with the intelligence team, how was the team structured? What was the hierarchy both within the team and external to the team? [structure]
   a. What were the lines of communication (explicit and implicit) both within the team and with external stakeholders? [systems]
10. During your time with the intelligence team, what was the team's role within the broader company? How did the team and its responsibilities interact with those of other parts of the organization? [structure]
11. How, if at all, did the team members organize and align themselves (informally)? [structure]
   a. What positions or specializations were represented within the team? [staff]
12. Within the team did you perceive decision making to be centralized or decentralized? [style]
   a. What do you perceive as the positives and negatives of this decision-making structure?
13. Who, if anyone, was responsible for decision making based on the information provided by the team? [systems]

14. What, if any, processes were associated with the day-to-day internal operations of the team, including tracking projects, coordination, etc.? [systems]
15. What, if any, were the main systems that ran the organization external to the team itself (i.e., HR policies regarding recruitment and promotion, information security policies, document storage and retention policies, communication standards with senior leadership, etc.)? [systems]
16. In your experience, what was the team culture? For example, did team members tend to be cooperative or competitive? [shared values]
    a. How strongly do you believe team members adhered to these values?
    b. How did this impact the functioning of the team?
17. What was the corporate culture outside of the team? [shared values]
18. What were the broader company's stated/fundamental values? [shared values]
19. What leadership styles were employed during your time on the team?? [style]
    a. How effective do you believe these leadership styles were?
20. How, if at all, did leadership employ professional and/or skills development on the team? [style]
    a. How, if at all, did leadership seek to devolve responsibility and decision making to lower levels?

During the interviews, each participant will also be requested to identify

- His or her title and role on the team;
- The timeframe during which he or she was a member of the team.

APPENDIX G

Questionnaire

- Q1. What skills or competencies do you believe are most necessary for a private sector intelligence team to employ? [skills]
- Q2. What is the size of your team? [staff]
- Q3. What positions or specializations are present on your team? [staff]
- Q4. How does your team receive its taskings? [systems]
- Q5. How does your team address intelligence requirements? [strategy]
- Q6. How is your team structured? [structure]
- Q7. What processes or procedures are associated with the day-to-day internal operations of the team, including tracking projects, coordination, etc.? [systems]
- Q8. What values do you see employed by your team? [shared values]
- Q9. How does your team's leadership employ professional and/or skills development on the team? [styles]

This questionnaire also requested the following information for each respondent:

- The respondent's professional level (individual contributor, manager, or executive);
- The number of years of experience the respondent has in the private sector intelligence field, and
- The number of years of overall professional experience the respondent has in the intelligence field.

APPENDIX H

Criteria for Document Selection

To triangulate the data collected through the interviews, the researcher reviewed operational documents that describe the team's purpose and intent, its structure, its standard operating procedures (SOPs), its hiring criteria, and its overarching policies. For selection, the documents were required to meet the following criteria:

1. The documents were required to be operational in nature, addressing one or more element of systems theory highlighted in the McKinsey 7S framework
2. The documents were required to have been either created or in use within the timeframe of this study (between 2005 and 2021)
3. The documents were required to be specific to The Global company's intelligence team and its operations.

APPENDIX I

List of Documents Analyzed

Intelligence team] Capability

[Intelligence team] Standards

[Intelligence team] Best Practices for Intelligence Assessments

Manager-level Job Description

[Intelligence team] Presentation for the Board of Directors

[Intelligence team] Services Marketing Document

[Intelligence Team] Products Explanation

[Intelligence team] Core Competencies

[Intelligence team] Monthly Budgetary Expenditures, July 2021

[Intelligence Team] Travel Justification

[Intelligence Team] List of Vendors and Capabilities

[Intelligence Team] Planned Growth Document, 2019

[Intelligence Team] Headcount Document

[Intelligence Team] Headcount Request (Senior Analyst)

[Intelligence Team] Products Standards Slide

[Intelligence Team] Information Access and Training Document

Corporate – Regional Intelligence Model

Sample Risk Assessment

APPENDIX J

Recruitment Letter for Questionnaire

PEPPERDINE
UNIVERSITY

Written Recruitment Script

Dear [Name],

My name is Angela Lewis, and I am a doctoral student in the Graduate School of Education and Psychology at Pepperdine University. I am conducting a research study examining building and leveraging intelligence teams in the private sector, and you are invited to participate in the study.

For the purposes of this study, a private sector intelligence team is defined as a team that is focused on global issues such as crime, terrorism, or economic or political stability and seeks to provide strategic analytic insights to business leaders to aid in decision-making. A geopolitical focus is defined as addressing how political power is undermined or reinforced by practical decisions by political and social leaders within geographical boundaries and networks. As such, key geopolitical issues typically include political and economic stability, terrorism, crime, and civil unrest, amongst others.

If you agree and consider yourself to be a part of a geopolitically-focused private sector intelligence team, you are invited to complete a qualitative questionnaire regarding your perceptions of the private sector intelligence field.

The questionnaire is anticipated to take no more than 15 minutes to complete. Participation in this study is voluntary. Your identity as a participant will remain anonymous during and after the study, and if direct quotes from the survey are used, pseudonyms will be employed.

If you have questions or would like to participate, please contact me at angela.lewis@pepperdine.edu.

Thank you for your participation,

Angela Lewis
Pepperdine University
Graduate School of Education and
Psychology
Doctoral Student