

An Exploration of Leadership Practices in Scotland's Contact Centre Industry

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Alberto Orozco

Declaration

I hereby declare that this thesis is my own work and effort and that it has not been submitted anywhere for any award. Where other sources of information have been used, they have been acknowledged.

Signature:

Date: 11th December 2017

Abstract

The aim of this research was to explore the leadership practices implemented in Scotland's contact centre industry in order to identify the leadership theories adopted in the customer-focused, highly controlled, and standardised environment of contact centres.

The study involved a non-probability purposive sample of forty participants, including managers and agents working at operational level in six contact centres. Following an Interpretivist/Constructivist paradigm, the participants' perceptions and lived experiences were analysed and interpreted in order to gain an understanding of leadership in their working environment and thus build an overall view of the reality explored (Lincoln & Guba, 1985; Schwandt, 2000). Considering the exploratory nature of the study and the aim of achieving an in-depth understanding of the phenomenon under investigation, this research followed a qualitative methodology and used semi-structured interviews (with managers) and focus groups (with agents) complemented with non-participant observation as data collection methods (Kerwin-Boudreau & Butler-Kisber, 2016; Saldaña, 2011). The data were examined by means of an Interpretative Phenomenological Analysis (Smith, Flowers, & Larkin, 2009).

The outcome of the study supported the view that managers tended to implement Transformational Leadership (Bass, 1985; Burns, 1978) since its characteristics were more closely aligned to the agents' perceptions of a leader, especially with regards to nurturing relationships based on support, trust, and respect, thus also evoking the Leader-Member Exchange theory (Dansereau, Graen, & Haga, 1975; Graen & Scandura 1987). In addition, most individual leadership practice (i.e., sole leaders) co-existed with Distributed Leadership (Gronn, 2000, 2002b), which was implemented to differing degrees as a collective leadership practice. The combination of both leadership practices in contact centres, which was mainly intended to promote staff development, provided evidence of Hybrid Leadership configurations (Gronn, 2008, 2009b) found in a context different from education and healthcare.

As a main theoretical contribution, this study has extended the overall notion of leadership by Northouse's (2015) adopted in this research and has identified the

main leadership theories implemented in Scotland's contact centres. As a practical contribution, this study has expanded the purposes of Hybrid Leadership (Gronn, 2008, 2009b) in a contact centre environment, increasing likewise the knowledge on the practical application of that particular theory.

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Acronyms

B2B	Business To Business
B2C	Business To Consumer
CCA	Contact Centre Association
CCMA	Contact Centre Management Association
DTI	UK Department of Trade and Industry
ECCO	European Confederation of Contact Center Organisations
ENU	Edinburgh Napier University
FDI	Foreign Direct Investment
GIA	Global Industry Analysts
HESA	Higher Education Statistics Agency
HIE	Highlands and Islands Enterprise
HEI	Higher Education Institutions
ICMI	International Customer Management Institute
IDS	Income Data Services
NCSL	National College for School Leadership
ONS	Office for National Statistics
SBNN	Scottish Business News Network
SDI	Scottish Development International
SG	Scottish Government
TUC	Trade Union Congress
UN	United Nations

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Chapter 1 – Introduction

1.1 Introduction

This chapter provides the background for the research study by explaining first the research rationale within the context of Scotland's contact centre industry. The main aim and objectives as well as the contributions to knowledge will be then outlined, which will be followed by an introduction to the research design and the methods applied in this study. To conclude, the main limitations derived from the research will be specified prior to highlighting the structure of the thesis by providing a brief summary of the content of each chapter.

1.2 Rationale for research

This thesis addresses the topic of leadership in Scottish contact centres, considering the limited research exploring the leadership phenomenon in that working environment, in general, and the lack of studies in the Scotland's context, in particular. Accordingly, the research reviewed key leadership theories drawn from the literature in the leadership field, spanning from the early approaches up to the latest emerging perspectives.

Leadership is one of the social science's most examined topics (Day & Antonakis, 2012a) and a "highly valued commodity" (Northouse, 2015, p. 1), but still an elusive concept due to its enigmatic nature and its capacity to remain undecipherable (Yukl, 2013). The phenomenon has been studied from different perspectives (e.g., traits, behaviours, situations, relationships) by applying several research methods (e.g., questionnaires, interviews, observations) and methodologies (e.g., survey research, ethnography, grounded theory) in diverse contexts (e.g., business, healthcare, education) and on multiple levels of analysis (e.g., individuals, groups, organisations) (Avolio, Walumbwa, & Weber, 2009; Bryman, 2011; Day, 2014a; House & Aditya, 1997; Northouse, 2015).

Yet, the concept of leadership remains surprisingly ambiguous both in theory and in practice, despite having been investigated for over 100 years and having been empirically linked both directly and indirectly to numerous and diverse outcomes

(Amundsen & Martinsen, 2015; Chiniara & Bentein, 2016; Lin & Chen, 2016; Miao, Newman, Schwarz, & Xu, 2013).

Leadership studies in contact centres are curiously scarce, revealing a shortage of empirical research on that topic in that particular environment, which is hard to comprehend when considering the impressive development of the industry worldwide. That is also the case in Scotland, which hosts a thriving and dynamic sector that continues to generate employment and contributes strongly to its economy (Catalystcf, 2014; DimensionData, 2016a; SDI, 2013a, 2013c; Technavio, 2016).

To date, research conducted in contact centres, including those located in Scotland, has focused on diverse aspects of the work that have been subject to extensive analysis, such as employment relations, management-agents conflict, employee well-being, or human and technological fit (Hannif, Connell, McDonnell, & Burgess, 2014a; Kahlin & Tykesson, 2016; Lloyd, 2016; Mellor, Moore, & Siong, 2015). However, studies addressing the leadership practices implemented in those working environments are virtually non-existent.

While Russell (2008, p. 213) suggested that “more research is needed into the leadership role that managers of call centres can assume”, little has been done in that regard ten years later. In fact, only a few studies conducted in Australia, China, Denmark, Israel, and the US have shed some light on leadership within a contact centre environment, in the face of a complete absence of those in Scotland or the overall UK. Huang, Chan, Lam, and Nan (2010), for instance, focused on the effects of Leader-Member Exchange on staff burnout and working performance, whereas other authors (Bartram & Casimir, 2007; Bramming & Johnsen, 2011; Grant, 2012; Kensbock & Boehm, 2016; Tse, Huang, & Lam, 2013) have highlighted the role played by transformational leaders on some individual outcomes (e.g., employee turnover, job performance, satisfaction).

Beyond their purposes and results, those studies seem to presume in advance the existence of some leadership styles (as practical manifestations of certain leadership theories) in the contact centres subject to study. Similarly, each of them collected data solely from a single contact centre and – with the exception of Bramming & Johnsen (2011), who applied a qualitative approach and an

ethnography strategy – most authors followed a quantitative methodology to establish relationships with certain outcomes that implies an aim for explanation and prediction characteristic of a Positivist paradigm (Blaikie, 2008; Grix, 2010; Spencer, Pryce & Walsh, 2014).

Yet, a more *logical* and *practical* approach, taking into account the scarce leadership research in that context, would consist of exploring in the first place the way that leadership is perceived in several contact centres in order to identify which leadership theory (ies), if any, are actually enacted in those workplaces, rather than studying directly the effects of a specific leadership theory/style in a barely explored organisational setting as far as leadership is concerned. In addition, the adoption of a qualitative methodology grounded on the Interpretivist paradigm has the potential to provide a different, richer, and deeper lens to study leadership, which may contribute to gain, unlike the Positivist paradigm underpinning a quantitative methodology, a more comprehensive account of such a complex phenomenon (Aliyu, Bello, Kasim, & Martin, 2014; Antwi & Hanza, 2015).

As the topic of leadership has not yet been investigated in contact centres in Scotland, there is a lack of knowledge regarding the leadership practices adopted by staff members in their daily work. If leadership is conceived as a key resource for modern organisations (Markham, 2012; Northouse, 2015; Parry & Bryman, 2006; Rost, 1991; Yukl, 2013), then Scottish contact centres are not taking advantage of that resource and, consequently, they are preventing themselves from maximising the leadership potential of their staff members individually and their organisations as a whole. Hence the importance of looking into the leadership practices in Scotland's contact centres.

Therefore, this research will explore how leadership is perceived and experienced in Scotland's contact centres, considering the gap in the literature investigating in-depth the leadership practices in those organisations within the Scottish context, and in view of the strategic significance of the industry for Scotland's economy both in terms of employment and revenue (SDI, 2013b).

1.3 Aim and objectives

The main aim of this research was to explore the leadership practices implemented in the contact centre industry in Scotland in order to critically identify the leadership theory(ies) adopted in that context.

In order to achieve the main aim, this research will pursue the following objectives:

- To critically review the theoretical and empirical research on leadership.
- To provide an insight into Scotland's contact centre industry, outlining the factors that have contributed to its increasing growth.
- To collect primary data from key individuals working in contact centres located in Scotland.
- To critically analyse contact centre staff perceptions and experiences of leadership.
- To establish implications based on the research findings and conclusions.

1.4 Contribution to knowledge

This research aimed to make both a theoretical and practical contribution to the contact centre literature and, most importantly, to the leadership field.

In the first place, this study has theoretically contributed to knowledge by expanding the definition of leadership proposed by Northouse (2015). While Northouse's account is comprised of three dimensions (i.e., *influence based on persuasion, team context, and common goal*), this research has:

- extended the first dimension (i.e., influence based on persuasion) by adding other forms of influence, such as *authority, control, and power*;
- found support for the *goal* dimension; and
- incorporated two new dimensions (i.e., *team management and building working relationships*).

Altogether, those dimensions configure a context-specific definition of leadership because it applies particularly to a contact centre environment.

Likewise, this study has made an overall theoretical contribution to leadership theory by identifying the leadership theories (i.e., Transformational Leadership, Leader-Member Exchange, Distributed Leadership, and Hybrid Leadership) implemented by staff members in the highly controlled and standardised environment of contact centres, which may help inform further organisational change. In doing so, this research has added further knowledge on the leadership practices implemented by managers and agents in their day-to-day work in contact centres, where research on leadership is limited and has only focused on Leader-Member Exchange and Transformational Leadership theories (Bartram & Casimir, 2007; Bramming & Jonhsen, 2011; Huang et al., 2010; Grant, 2012; Kensbock & Boehm, 2016; Tse et al., 2013).

In the second place, this study has, as a practical contribution, broadened the knowledge on the practical application of Gronn's (2008, 2009b) Hybrid Leadership theory regarding its key purpose (i.e., adaption to changing environments). Three more interrelated purposes were identified: staff development, minimisation of errors and risks, and reduction of managers' workload. Additionally, this study distinguishes staff development, unlike Gronn's theory, as the key purpose of enacting Hybrid Leadership configurations.

By conducting a qualitative study, this research has addressed a methodological shortcoming within the leadership field, which follows a continuous appeal within the literature for additional qualitative research (e.g., Conger, 1998; Klenke, 2016; Parry & Bryman, 2006) since empirical leadership research has been dominated by a quantitative methodology that did not allow a deep level of analysis of the intricacies of the leadership phenomenon (Avolio et al., 2009; Bryman, 2011; Gardner, Lowe, Moss, Mahoney, & Cogliser, 2010).

In addition, the study used a different lens to study leadership through the interpretations of the ongoing processes of interactions and relationships between the individuals involved in leadership practice by adopting an Interpretative/Constructivist paradigm (Guba & Lincoln, 1994, 2005; Holstein & Gubrium, 2011; Lee, 2012), as a contrast to the predominance of the Positivist paradigm implemented in leadership research, in general, and in the limited studies on leadership in contact centres, in particular.

1.5 Research design and methods

The research design is grounded on a qualitative methodology complemented with a phenomenological research design which support the analysis of complex phenomena, such as leadership, in order to gain a deeper understanding; but also both are suitable for conducting research with an exploratory purpose (Groenewald, 2004; Kerwin-Boudreau & Butler-Kisber, 2016; Klenke, 2016; Paschal, Ehrich, & Pervaiz, 2014).

Accordingly, the present research adopted an inductive logic of inquiry and an ideographic perspective, whereby the empirical data collected enabled the researcher to move from the particular to the general while facilitating the analysis of specific cases, respectively, as both approaches are associated with a qualitative methodology and a phenomenological strategy (Blaikie, 2007; Lincoln & Guba, 1985; Reichertz, 2014). In order to evaluate the quality of the present study, trustworthiness and authenticity were applied as quality criteria, in line with a qualitative research methodology (Bryman, Becker, & Sempik, 2008; Guba & Lincoln, 2005; Tracy, 2010).

Finally, the data collection were conducted through semi-structured interviews with managers, focus groups with agents, and non-participant observations on both groups. This multi-data collection method facilitates the gathering of rich data from different sources and their further triangulation in order to increase the research trustworthiness and authenticity (Carter, Bryant-Lukosius, DiCenso, Bhythe, & Neville, 2014; Jonsen & Jehn, 2009). The samples of both semi-structured interviews and focus groups were based on the application of a non-probability purposeful sample, particularly suitable for qualitative studies and a phenomenological research strategy (Guetterman, 2015; Patton, 2015).

1.6 Research limitations

The first and foremost limitation of this research relates ineludibly to the confusing and abstract nature of the concept of leadership, which may have prevented some participants from expressing confidently their views and experiences on the topic (Campbell, 2013; Yukl, 2013).

The application of an Interpretive/Constructivist paradigm and a qualitative methodology, which involves the emic role of the researcher, can potentially compromised the credibility and authenticity of the findings since the diverse analyses, interpretations, and conclusions might be subject to bias (Guba & Lincoln, 2005; Klenke, 2016; Laverty, 2003).

As this research has been conducted following a qualitative approach, findings cannot be generalised to the whole population (Klenke, 2016; Ritchie, Lewis, Nicholls, & Ormston, 2014); therefore, results may not be relevant to the aggregate of contact centres in Scotland. This limitation is due to the application of a non-probability purposeful sample, which is devoid of any statistical representativeness; and to the limited number of contact centres involved in the study, as compared to the total population (Gentles, Charles, Ploeg, & McKibbin, 2015; Patton, 2015).

It should be noted, however, that the aim of qualitative research is not to be representative of the total population but to gain an in-depth understanding of the phenomenon under investigation (Eriksson & Kovalainen, 2015; Neuman, 2014; Ritchie et al., 2014). Nevertheless, the findings might be transferable to other contexts or settings based precisely on the application of a purposeful sample, which includes cases based on similar or specific characteristics in a specific context (e.g., individuals working in contact centres at operational level), so the findings could also be of interest to individuals in other similar settings (Guba & Lincoln, 1989; Patton, 2015).

Finally, attempts to obtain relevant, updated data on the contact centre industry in Scotland (e.g., statistics, reports) from the Contact Centre Association in Glasgow were unsuccessful. In consequence, this research lacks potentially of additional industry-related data referring specifically to the Scotland's context.

1.7 Structure

The remainder of the thesis is structured as follows:

Chapter 2 – Context-Setting – provided an overview of Scotland's contact centre industry, highlighting the factors that have played a key role in its development. In order to generate a comprehensive account of the internal dynamics of contact

centres, the analysis will be complemented with a critical exploration of the work organisation, working conditions, management practices, and related issues characteristic of those organisations.

Chapter 3 – Literature Review – explored the leadership field by means of relevant literature on the topic, including a brief introduction describing the origins and further development of the leadership phenomenon. The chapter will also comprise a discussion on the multiple definitions and conceptualisations of the term, which will be followed by an analysis of the diverse concepts related to leadership. Finally, an exploration of the leadership practice will be undertaken by means of an overview of the key leadership theories, which will be subject to critical examination.

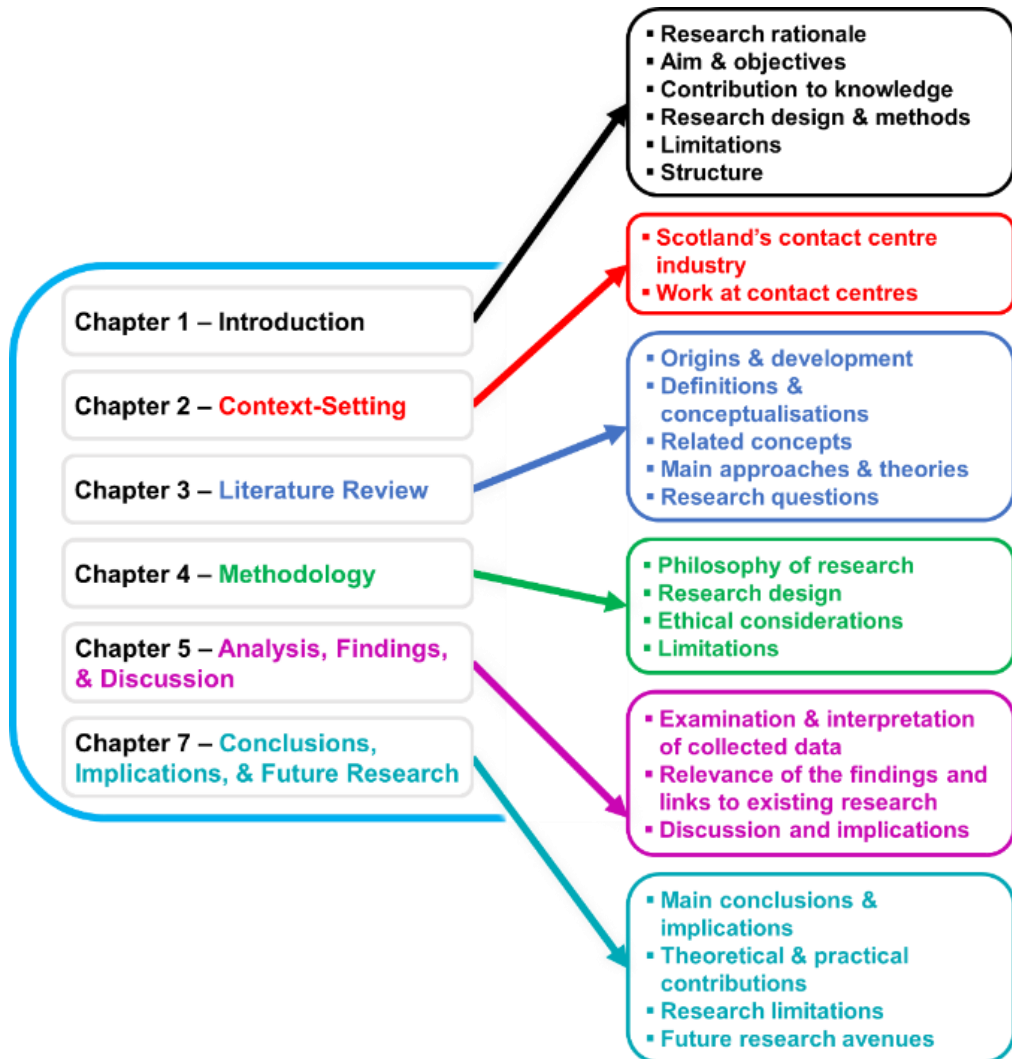
Chapter 4 – Methodology – explained the research philosophy and the research design applied in the present study. The philosophical approach adopted in this research will be described and discussed, which will serve as a basis to further understand and explain the research design and the choices regarding its diverse components (e.g., sampling, research methods). To conclude, the ethical considerations and the limitations associated with the research will also be discussed, including the measures taken to minimise those limitations.

Chapter 5 – Analysis, Findings, and Discussion – first examined and interpreted the data collected from interviews, focus groups, and observations. This analysis will identify and report the key findings, which are supported by relevant and anonymous quotes from the different participants in order to provide evidence of the findings and to illustrate the corresponding claims and viewpoints that may originate from them. Then, the key findings will be discussed and contrasted with the relevant literature on the topic in order to determine their relevance within the context of the present research.

Finally, Chapter 6 highlights the main conclusions and recommendations based on the analysis, interpretation, and further discussion on the data collected. Then, the extent to which the main aim and research objectives have been met will be addressed. The chapter will be completed by outlining the main limitations encountered in the implementation of the research design and will suggest avenues for future research based on the findings and conclusions.

Figure 1.1 below shows a graphic representation of the structure outlined above.

Figure 1.1: Structure of the thesis



Chapter 2 – Context-Setting

2.1 Introduction

This chapter will first provide an overview of the contact centre industry in Scotland by explaining the key factors that have contributed to its continuous growth based fundamentally on industry reports, specialised websites, and business press. Then, the internal dynamics and work-related issues at those sites will be critically explored by means of relevant academic literature in order to gain an insight into the daily routine of a contact centre environment.

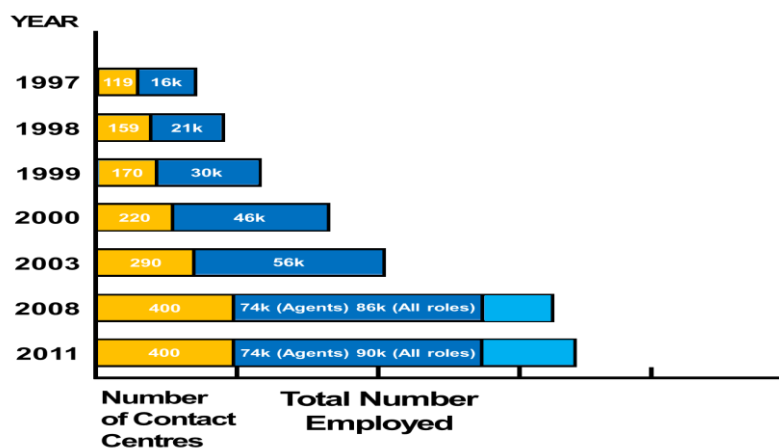
Since requests for information to the relevant organisations (i.e., CCA, CCMA, SDI) were unsuccessful, some of the data shown in this chapter (e.g., number of contact centres, people employed, salaries) is not updated, so it may not reflect accurately the current situation of the industry.

Also, some key figures (e.g., number of in-house/outsourced operators, market share, turnover, annual investment) are not available, which weakens overall the value of the present analysis. In addition, the constrained timeframe of this research has equally impacted on the ability to find alternative and reliable sources of information in order to provide additional key data.

2.2 The contact centre industry in Scotland

Scotland is one of the world's leaders in contact centre operations. Following a similar pattern to the global and the UK cases (see Appendix A, p. 226), the Scottish contact centre industry, established in the early 1990s, has experienced continuous growth since 1997 (see Figure 2.1 below) as a result of the many multinational companies (e.g., Amazon, Dell, esure, HSBC, LloydsTSB, O2, Sky) and global outsourcing service providers (e.g., Sykes, Capita, CGI, Capgemini, IBM, TelePerformance, Serco, Webhelp) coming from all over the world to establish customer service operations in Scotland (SDI, 2013a, 2013b).

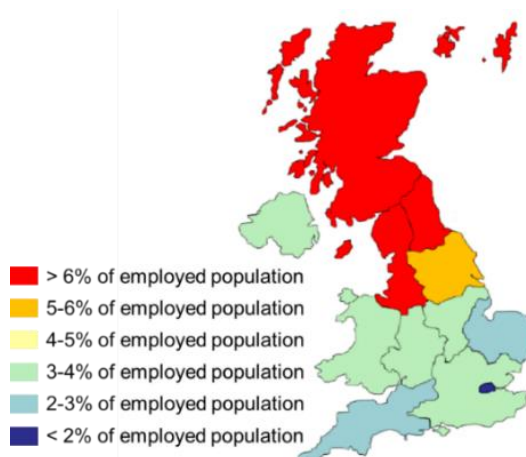
Figure 2.1: The growth of the contact centre sector in Scotland 1997-2011



Source: Taylor & Anderson 2011 Report; cited in SDI (2013b), p. 4.

It is estimated that over 90,000 people are currently working in more than 400 contact centres across Scotland, which represents over 6% of the employed population (see Figure 2.2 below). Between 2009 and 2013 alone, the workforce increased by 12%, from 13,200 to 14,800 people, within the Scottish business service sector as a whole (SDI, 2013b; Sutherland, McTier, & McGregor, 2015; Taylor & Anderson, 2011).

Figure 2.2: Employed population working as contact centre staff, by region



Source: ContactBabel UK (2015), p. 2.

The industry, which is mostly concentrated within the Edinburgh-Glasgow hub (see Appendix A, p. 230), provides services for a variety of sectors, such as retail, motoring, technical support, or travel; but most of the workers are employed in financial services (36%), media/communications (16%), public sector (15%), telecoms (8,8%), and utilities (8%), mirroring the global trends (DimensionData, 2015; SDI, 2013b).

In addition, the Highlands and Islands region has developed a Business Processing Outsourcing (BPO) sector that employs 4,000 people across 30 centres, characterised by high quality and flexible staff, low absenteeism, competitive costs, and significant opportunities for growth (SDI, 2013c; Sutherland et al., 2015). In this regard, the Scottish outsourcing sub-sector, which grows at a faster rate than any other component of the Scottish contact centre market, achieved a £150 million turnover in 2012. This was the third highest as compared to other UK locations and it has generated altogether around £10bn for the economy (HIE, 2012; Oxford Economics, 2012; SDI, 2013a; Taylor & Anderson, 2011). Overall, Scotland's contact centre sector, including BPO services, employs around 120,000 people and has yielded a £314.8 turnover in 2014, which represents a substantial increase compared to the previous year (SG, 2014).

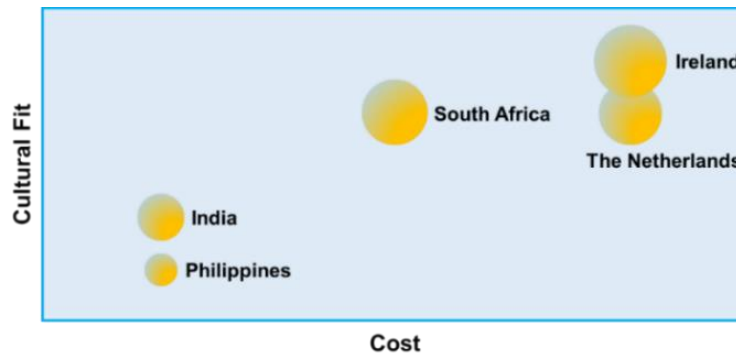
Besides the uncertainty generated by the Brexit result, Scottish contact centres will still need to deal with the prospect of another referendum for independence and, therefore, assess the potential impact from the resulting complexity of the social, economic, and political landscape in a hypothetical independent Scotland (Ashmore, 2016; MacIntyre-Kemp, 2016; O'Leary & Baczynska, 2016). Irrespective of the outcomes of both events, the coming years will test Scotland's contact centre industry strength and capacity to adapt and to remain competitive in an ever more complex global business environment.

2.2.1 Major trends and recent developments. In the early 2000s, many companies started to move their contact centres operations to low-cost overseas locations (e.g., India, Malaysia, the Philippines, South Africa) attracted by the incentives offered by those countries (e.g., low taxes, subsidies, grants, low-priced office space), but fundamentally to capitalise on their less expensive but highly qualified workforces in order to reduce costs and increase profitability (Bain & Taylor, 2008; DTI, 2004; Taylor & Bain, 2003a).

By apparently disregarding the cultural fit in favour of cost-advantages (see Figure 2.3 below), the outsourcing trend gained momentum and thousands of jobs were transferred to offshore locations whereas other sites simply closed (Bain & Taylor, 2008; BBCNews, 2006; The Scotsman, 2003; Wray, 2002).

According to Taylor & Bain (2003a), the impact of job losses in Scotland was lesser than in other UK regions, causing a “marginal effect” (p. 3), so the sector managed to maintain its growth tendency (MyCustomer, 2006; The Scotsman, 2006).

Figure 2.3: Cost and cultural fit



Source: DTI (2004), p. 9.

Eventually, many companies (e.g., BT, HSBC, EE, Lloyds TSB, Santander, Vodafone) began to relocate their customer services back to the UK, which also benefited Scotland (BBCNews, 2011; Mackie, 2013; SBNN, 2016), due to rising costs and customer dissatisfaction (e.g., accents, customer-handling skills, service quality) with offshore providers (Arnott, 2011; Davies, 2016; Hawkes, 2013; Trenor, 2007). In doing so, organisations benefited from cultural affinity, cost savings, and geographical proximity (Everest, 2015).

Despite the 2008 financial crisis, which pushed some service providers out of the market and caused redundancies within the whole sector (Durrani, 2009; The Scotsman, 2008; Waller, 2009), the Scottish industry maintained their capacity by attracting new companies (e.g., Virgin Money, H&M, John Lewis Partnership, Tesco Personal Finance) (Taylor & Anderson, 2011).

In the last few years, there has been a flow of acquisitions that have contributed to consolidate the industry: e.g., French operators Teleperformance and WebHelp acquired Scottish outsourcing service providers beCogent and HEROtsc, respectively; Canadian CGI bought Logica; while Serco acquired Vertex’s public sector business (BBCNews, 2010, 2012; CallCentre, 2012; Robinson, 2013), reflecting the dynamism of the industry as well as the international interest in the Scottish market.

The industry's cluster track record and export competitiveness have also contributed to enhance the international attractiveness of the sector, which has expanded over 60% since 2003 by absorbing 34,000 additional employees, while increasing during the 2009-2013 period alone by 12%, rising from 13,200 to 14,800 new jobs (FDi Benchmark, 2016; SDI, 2013b; Sutherland et al., 2015). Furthermore, the industry has continued steadily growing, placing Scotland as a major international location for customer contact centres as well as for BPO companies providing back-office services (e.g., human resources, payroll, accounting, contact centres) to third parties (BBCNews, 2015, 2016; ContactCentres, 2015a, 2015b, 2016; Heggie-Collins, 2015; Mackie, 2017; McCann, 2016; Newlands, 2016; Whitaker, 2013).

2.2.2 Key strengths and competitive advantage. The increasing growth of the industry has been mainly driven by three key factors discussed below by order of importance:

Highly qualified and available workforce. The working population of Scotland's central belt, where the industry is concentrated, amounts to 2.7 million people (see Appendix A, p. 231), approximately (ONS, 2015). With the highest concentration of Universities in Europe, Scotland has over 232,000 students in Higher Education (and above 280,000 including Further Education Colleges) attracted by its internationally renowned education system (HESA, 2016). As a result, 21% of the overall working age population (a percentage higher than the UK average) holds a degree qualification or above (SDI, 2013a).

Those conditions allow Scotland-based contact centres to get access to a highly educated labour pool equipped with knowledge and skills particularly suitable for the industry (SDI, 2013a), and to provide services in twenty-six different languages thanks to the students enrolled/graduated each year and the large community of overseas students living in Scotland (see Tables 2.1, 2.2 below). Unable to compete on low costs with overseas providers, Scottish contact centres have focused on providing high quality services by investing in staff development (e.g., training, skills) and technological innovation in order to maintain their competitive advantage (Curry & Lyon, 2008; SDI, 2013b; Taylor & Anderson, 2011).

Table 2.1: Students in Higher Education in Scotland 2014/2015 (by subject area)

Enrolments		Graduates	
Business & Administrative Studies	25,480	Business & Administrative Studies	13,675
Engineering & Technology	16,455	Engineering & Technology	6,005
Mathematical Sciences	1,445	Mathematical Sciences	995
Computer Science	8,825	Computer Science	3,280
Languages	8,855	Languages	3,140

Note: Figures include undergraduate and postgraduate studies.
Source: HESA (2016).

Table 2.2: Top ten overseas countries of student enrolments in Higher Education 2014/2015

European Union		Non-European Union	
1. Germany	2,755	1. China	7,595
2. Republic of Ireland	2,110	2. United States	4,145
3. Bulgaria	1,625	3. Nigeria	1,835
4. Greece	1,580	4. Malaysia	1,415
5. France	1,530	5. India	1,405
6. Italy	1,325	6. Canada	1,005
7. Lithuania	1,120	7. Hong-Kong	830
8. Spain	1,005	8. Norway	795
9. Poland	890	9. Saudi Arabia	685
10. Sweden	845	10. Thailand	645

Note: Figures include undergraduate and postgraduate students.
Source: HESA (2016).

In summary, the availability of working population and the high ratio of qualified graduates (see Table, 2.3) make Scotland's contact centres workforce "one of the best trained, most reliable and cost-competitive labour forces in the world" (SDI, 2013b, p. 11).

Table 2.3: Staff quality and availability

Rank/Location Factor	Quality of Staff	Availability of Staff
1 st	Scotland	London
2 nd	East Anglia	Scotland
3 rd	Northern Ireland	North-East

Source: SDI (2011), p. 12.

Location and quality-cost ratio. Scotland is strategically situated for conducting business within Europe and well connected through transport links with the rest of the world, which makes it an ideal platform to reach both the European and the American markets. The country has strengthened its position as one of the most attractive regions in the UK and Europe for FDI, and counts on a network

of business parks that provide office space and services for businesses to grow (EY, 2018; SDI, 2018).

In addition, Scottish contact centre salaries are much lower than other competing UK regions (see Appendix A, p. 232), which may have equally increased Scotland’s appeal as a location. Costs and the availability of high quality staff are the two most critical factors when selecting globally new contact centre locations (Deloitte, 2013; SDI, 2011; Taylor & Anderson, 2011), suggesting that their combination may form the most valuable competitive advantage of Scotland’s contact centre industry. In fact, the Scottish Central Belt is the second highest ranked European location in terms of the overall quality-cost ratio (see Table 2.4).

Table 2.4: Cost score, quality score and competitiveness rating

Location	Rank	Rating	Quality Rank	Quality Score	Cost Rank	Cost Index	Total Cost (GBP)
Paris	1 st	100.00	1 st	173.16	6 th	138.35	24,641,503
Scottish Central Belt	2nd	87.35	2nd	107.17	4th	91.94	16,375,429
Lisbon	3 rd	78.48	4 th	78.48	2 nd	86.09	15,333,624
Belfast	4 th	78.44	5 th	73.15	1 st	82.25	14,649,850
Berlin	5 th	75.39	3 rd	98.47	5 th	114.03	20,309,771
Cardiff	6 th	74.16	6 th	69.57	3 rd	87.33	15,555,662

Sources: FDi Benchmark Report & SDI (2016), p. 7.

Infrastructure. Scotland has developed a solid infrastructure to support its contact centre sector. The Contact Centre Association (CCA) – the UK’s leading professional body for contact centres based in Glasgow – sets the best practices and quality standards, and provides support (i.e., research, expertise) for their members, which employ one-third of the UK’s contact centre population. In partnership with UK service providers (e.g., Sky, Tesco, BBC, RBS, WebHelp), CCA organises training courses and workshop programmes. The CCA Training Accreditation, for instance, is the standard in-house training programme for employees who work in CCA contact centres across the UK (CCA, 2016).

The government has fostered a supportive business environment for those companies aiming to invest in Scotland (SG, 2018). Scottish Development International (SDI) – along with Scottish Enterprise (both Scottish Government agencies also based in Glasgow) – provide guidance and support (e.g., training, market and property information, access to finance, R&D programmes) to

overseas companies intending to set up contact centres operations in Scotland (FT, 2013; SDI, 2016; Scottish Executive, 2003). In addition, some Further and Higher Education Institutions as well as private training providers partnering with companies, CCA, and Highlands and Islands Enterprise, offer numerous tailored courses (e.g., Team Leader Development Programme, Pre-Recruitment Training, Vocational Qualifications in Call Handling) designed to meet the specific needs of contact centres and BPO's (SDI, 2013b, 2013c).

The proliferation of contact centres as a growing source of employment has also triggered a parallel development of trade unions – such as Unison, CWU, PSC, Unite, or Prospect – which protect workers' rights within the industry and promote suitable working conditions (TUC, 2016; Unison, 2013). Finally, Scotland counts on a cost-effective IT and telecommunications network that provides high quality services through fibre optic technology across the country. The network is not only extended to rural areas but also connected to Europe and North America, providing connectivity for customers to the main infrastructure (SDI, 2013b).

2.3 Contact centres: an insight

The content of this section will reflect on the origins and evolution of the contact centre phenomenon in the UK, to further discuss particular aspects of that define the contact centres environment, such as their work organisation, working conditions, and management strategies.

2.3.1 Definition and origins. A few years ago, a contact centre was “a central place which has the ability to handle a substantial volume of calls at the same time, normally by using some amount of computer automation” (Mintel, 2007, p.15). That definition no longer applies entirely as current contact centres do not rely exclusively on phone calls to perform their operations; they have evolved into multichannel systems (or omnichannel platforms, more recently) to interact effectively with their customers (DimensionData, 2016b; Technavio, 2016).

The origin and development of contact centres in the UK is closely linked to technological advances (e.g., telecommunications networks, optical fibre, Internet protocols); in particular, to the development in the 1950s of Automatic

Call Distributor (ACD) systems, which filtered and assigned automatically inbound calls to agents (Ellis & Taylor, 2006). The establishment of the first contact centre – the Birmingham Press and Mail centre in 1965 – was followed by major companies' operations (e.g., Barclaycard, Direct Line, LloydsTSB) in the 1970s and 1980s (Hucker, 2013). Since then, the industry entered a development cycle (see Appendix A, p. 233) shaped mainly by changes in technology and increasing competition.

Modern contact centres differ substantially from each other based on the markets they operate in (e.g., financial, distribution), the transactions undertaken (e.g., providing information, selling products), the functions performed (e.g., customer service, technical support), the customers served (e.g., end-users, businesses), the strategic focus (e.g., quality, quantity), the industrial relations developed (e.g., union coverage and coordination), the job quality and working conditions (e.g., contract, salary), or the training practices implemented; but they are usually flat organisations with relatively few layers of management, and most form part of larger rather than smaller companies (Batt, Holman, & Holtgrewe, 2009; Callahan & Thompson, 2001; Garavan et al., 2008; Glucksman, 2004; Holman, 2013).

In today's business environment, contact centres have become the main link between organisations and their customers, playing a key role within their overall business service strategies. Perhaps, more interestingly, contact centres have also become the iconic testament of the increasing dependence of organisations on technology in order to cope with the wider communication access instigated by the advent of the digital age.

2.3.2 Work organisation. The work in most contact centres is usually highly individualised and characterised by a high degree of standardisation (e.g., scripts, forms) and employee control through technology and management practices (Bain, Watson, Mulvey, Taylor, & Gall, 2002; Brophy, 2015; Russell, 2008; Taylor & Bain, 1999). The broad adoption of a Taylorist production-line approach (e.g., managerial control, high workload, standardisation) and focused on quantity rather than on quality (see Table 2.5 below), is based on a work centralisation that ensures management control and decision-making while reducing agents' autonomy (Bain et al., 2002; Dean & Rainnie, 2009; Gilmore,

2001; Murray, Jordan, & Bowden, 2004; Taylor, Mulvey, Hyman, & Bain, 2002). That approach caused contact centres to be initially branded “dark satanic mills” (IDS, 1997, p. 13), “assembly line in the head” (Taylor & Bain, 1999, p. 107), or “modern/new sweatshops” (Unison, 2002, para. 4; Fernie & Metcalf, 1998, p. 7), developing a perception that stigmatises and, to some extent, still defines the industry (Brophy, 2015; Fleming & Sturdy, 2011; Lloyd, 2016; Martí-Audí, Valverde, & Heraty, 2013; Taylor, D’Cruz, Noronha, & Scholarios, 2013). For a review on working conditions, see Appendix A, p. 235.

Table 2.5: Quantity and quality contact centres

Quantity	Quality
Simpler customer interaction	Complex customer interaction
Routinisation	Individualisation/customisation
Hard targets	Soft targets
Strict script adherence	Flexible – no scripts
Tight call handling times	Relaxed call handling times
Tight “wrap-up” times	Prioritisation of customer satisfaction
High percentage of time on the phone	Possibility of off-phone task completion
Statistically driven	Statistics modified by quality criteria
Volume	Value

Source: Taylor & Bain (2001), p. 45.

To such perception has also contributed the intense performance monitoring and pervasive technological surveillance implemented in contact centres (Ball & Margulis, 2011; Curry & Lyon, 2008; Ellway, 2013; Holman et al., 2002) to the extent of being regarded as an *electronic panopticon* that helps managers to maximise their power of supervision and extend *the frontiers of control* over agents as well as to reinforce the *Taylorisation* of work (e.g., process standardisation, routine tasks, employee low autonomy) through new information and communication technologies (Ellis & Taylor, 2006; Russell, 2008; Taylor Mulvey, Hyman, & Bain, 2002; Wickham & Collins, 2004). Managers, for instance, can monitor remotely and in real time the agents’ work or retrieve at any time all recorded data to assess their performance (Bain et al., 2002; Deery & Keenie, 2004; Hannif, Cox, & Almeida, 2014b).

In this regard, much has been discussed about the relationship or tension between staff and the use of technology (Antón, Camarero, & San José, 2014; Armistead, Kiely, Hole, & Prescott, 2002; Hannif et al., 2014a), especially in terms

of their implications for operational efficiency and employee productivity, which will replace first call resolution as a top operational priority (Adria & Chowdhury, 2004; Batt, 1999; DimensionData, 2017; Rowe, Marciniak, & Clergeau, 2011). Web chat, social media, or SMS have improved the interactions with customers and the ability to track down their communications (ContactBabel, 2016b; DimensionData, 2016b, 2017); however, rather than improving job quality, technological advancements have increased staff workload while enhancing managerial control, not only over agents (e.g., work pace, monitoring) but also over customers (e.g., scripts, interactive voice recognition) (Hannif et al., 2014b). This reality suggests that the type and organisation of work at contact centres remains essentially unchanged and any variations that may be introduced (e.g., new technology) will not alter their work design or, at least, agents' working conditions, despite the existence of alternative models (Batt & Moynihan, 2002; Frenkel, Tam, Korczynski, & Shire, 1998; Laureani, Antony, & Douglas, 2010; McAdam, Davies, Keogh, & Finnegan, 2009). Furthermore, there seems to be a contradiction between the implementation of operational-efficiency, cost-reduction strategies combined with the way agents are controlled and organised (e.g., performance monitoring, surveillance, training, working practices) and the aim of delivering a high-quality service and maximising customer satisfaction (Banks & Roodt, 2011; D'Cruz & Noronha, 2012; Dean & Rainnie, 2009; Robinson & Morley, 2006; Wallace, Eagleson, & Waldersee, 2000). This *paradox* for organisations that intend to provide a customer service is likely to persist as contact centres are forecast to move into more efficient and cost-effective strategies driven by global outsourcing activity (Lloyd, 2016; Owens, 2014; Townsend, 2007). Such contradiction is even replicated in studies determining job and contact centre quality dimensions when most are quantitatively-measured jobs and quantitatively-driven organisations (van Dun, Bloemer, & Henseler, 2011, 2012).

2.3.3 Conflicting evidence. In sharp contrast to most views discussed above, some studies have provided contradictory evidence on the conditions at contact centres, noting that salary, working hours, employee-management relations, or workload were satisfactory (Armistead et al., 2002; Jenkins & Delbridge, 2014; Robinson & Morley, 2007; Weinkopf, 2002). Moreover, features such as work

variety, empowered staff, promotional opportunities, higher autonomy when using scripts, and a focus on quality rather than on quantity have also been found in some sites (Collin-Jacques, 2004; Curry & Lyon, 2008; Hannif et al., 2014b; Hunt et al., 2010; Moss et al., 2008; Woydack & Rampton, 2016).

Some studies found that contact centre employees were not generally exposed to higher levels of job stressors as compared with other groups (e.g., service workers) (Holman, 2002; Zapf et al., 2003), and qualified as “insufficient” the evidence regarding agents’ voice health problems (Hazlett et al., 2009, p. 112). Allowing staff to freely express their emotions and develop social exchanges increases commitment, decreases stress, and leads to “humane” and “understanding” workplaces (Jaaron & Backhouse, 2011; Koskina & Keithley, 2010, p. 208). In addition, monitoring can increase agents' well-being when it is perceived as a tool for improving their skills (Belt & Richardson, 2005; Curry & Lyon, 2008; Holman et al., 2002), against most research reporting negative views/effects (e.g., Dean & Rainnie, 2009; Kjellberg et al., 2010; Murray et al., 2004). Jaaron & Backhouse (2011) even reported employees not being monitored by managers nor by technology.

Accordingly, ‘sweatshops’, ‘*electronic Panopticon*’, or ‘*slave galleons of the twenty first century*’ were rejected to define contact centres’ working environments, despite acknowledging the Neotayloristic approach, the constant control and monitoring exerted over the agents’ work, and the need for improving working conditions (Bain & Taylor, 2000; Robinson & Morley, 2007; Weinkopf, 2002). Although those cases certainly demonstrated that *other* contact centres and working conditions are possible, the evidence indicates that they represent an exception rather than a rule among the contact centre population.

2.3.4 Management strategies. There is a large body of evidence showing that the effective implementation of high involvement practices (e.g., self-managed teams, higher staff autonomy and decision-making, teamwork, relationship-oriented management, training & development, job variety, flexible work, job security, rewards) can prevent frontline staff from experiencing the issues mentioned above and improve their performance, commitment, and job satisfaction. Furthermore, they can even enhance organisational efficiency and

customer service while reducing turnover and absenteeism (Adria & Chowdhury, 2004; Hutchinson, Purcell, & Kinnie, 2000; Jaaron & Backhouse, 2011; Sprigg et al., 2003; Ramseook-Munhurrun et al., 2009; Varca, 2006; Wood et al., 2006). However, their application varies substantially or they are hardly applied across contact centres, contributing to perpetuate the effects of poor work designs (Gilmore, 2001; Holman et al., 2009; Martí-Audí et al., 2013; Murray et al., 2004; Taylor et al., 2002).

Instead, managers have generally implemented *other* strategies, such as:

- retention practices to avoid high turnover (Brannan, 2015);
- recruiting certain employees to pursue a “happy workforce” (Jenkins & Delbridge, 2014, p. 869) based on their behaviours and identification with organisational values in order to increase commitment and high quality service, and also deactivate potential resistance (Thompson et al., 2004; Townsend, 2007; van den Broek, 2002, 2004);
- creating teams without embracing teamwork to promote competition in order to intensify work and increase employee productivity, but removing any sense of collective identity to prevent group resistance (Mulholland, 2002; Townsend, 2005; van den Broek et al., 2005, 2008);
- combining “fun and surveillance” (Kinnie et al., 2000, p. 971) or directly institutionalising peer-surveillance (Ball & Margulis, 2011; Ellway, 2013; Thompson et al., 2004; van den Broek, 2002);
- encouraging to “being yourself” (Fleming & Sturdy, 2011, p. 189) to mask/distract from the existence of control mechanisms and thus ensure adherence to work processes (Callaghan & Thompson, 2002);
- using training and recreational gatherings to shape employees’ attitudes/behaviours and raise their morale, respectively, and thus exert normative control to enhance commitment (Brannan, 2015; Thompson et al., 2004; van den Broek, 2002); or
- adopting *employee-centred* approaches (e.g., quality *monitoring* team, targets-based *competition*, unions *involvement* in decision-making, developing trust to *maximise* technological performance) manipulated by the

management and used to evade collective-unionised representation (Bain et al., 2002; Gollan, 2004; Shire, Schönauer, Valverde, & Mottweiler, 2009) (*emphasis added*).

However, rather than addressing the sources of contact centres problems (i.e., poor job design, intensive monitoring and surveillance, deteriorating working conditions), those strategies aim at minimising their consequences. Beyond exposing alternative ways to exert or increase control over agents (see Table 2.6 below) that evoke the bird-cage analogy (Martí-Audí et al., 2013), they reveal an imbalanced system of power relations that reinforces the influence of management (control) practices.

Table 2.6: Control forms and their principal dysfunctions

Mode of control	Principal dysfunction	Be yourself as a detraction
Technical	Alienation and boredom	Fun and play
Bureaucratic	Disenchantment; anti-authoritarianism	Diversity, informality, and dissent
Cultural	Inauthenticity; 'organizational groupthink'	Authenticity, individualism

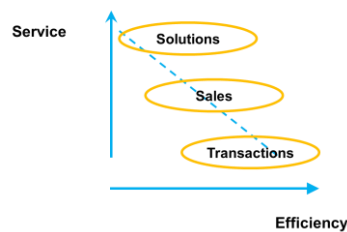
Source: Fleming & Sturdy (2011), p. 193.

Furthermore, most activities respond to a “sacrificial HR strategy” (Wallace et al., 2000, p. 175), which consists of ignoring deliberately relationship-oriented management practices (e.g., personal support) and minimise investments (e.g., staff training and development, technology) following a mass production-line model. Those practices will reduce costs, but will sacrifice simultaneously the motivation and commitment of front-line staff, which will inevitably result in employee burnout and high turnover (e.g., Thompson et al., 2004). As Houlihan (2000) stated: “they speak a language of teamwork, mentoring and support, but the moderating and overriding message is about ‘meeting the stats’” (p. 233).

The situation is reversed by recruiting new highly motivated/committed staff (which is more economical than running programmes regularly) in order to maintain the trade-off between quality service and efficiency levels at the expense of the physical and psychological well-being of existing staff (Callaghan & Thompson, 2002; Townsend, 2007). In doing so, organisations solve the efficiency-quality service goal conflict and avoid providing support for emotional labour, which is absorbed by the staff who will be likely turned over.

According to Wallace et al. (2000), tasks based on the same service-efficiency configuration (i.e., transactions) instead of individual optimal approaches (see Figure 2.4 below), technological advancements that reduced training costs (e.g., Townsend, 2007), and a large labour supply available to hire new staff (e.g., Peck & Cabras, 2009) have facilitated the successful implementation of the *sacrificial HR strategy* – or labour exploitation (Brophy, 2010; Gentleman, 2005; Lloyd, 2016) – and turned a problem into a *solution* (*emphasis added*).

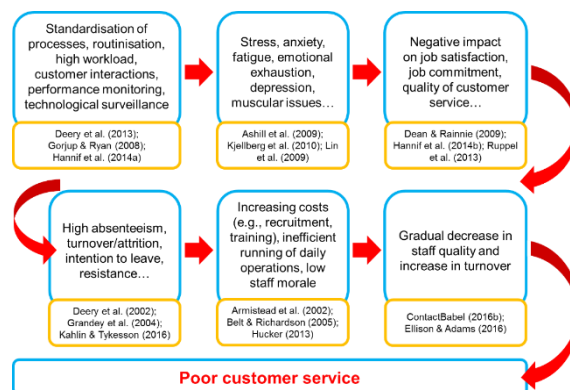
Figure 2.4: The optimum trade-off positions for call centre tasks



Source: Wallace, Eagleson & Waldersee (2000), p. 181.

Based on the internal work dynamics depicted by the literature, job quality and working conditions at contact centres are generally inadequate and should certainly be improved (Bohle et al., 2011; Deery et al., 2013; Gorjup, Valverde, & Ryan, 2009). Interestingly, the working model currently in place (e.g., productivity-focused job design, control-oriented management strategies, cost-reduction and efficiency targets, technological surveillance and monitoring, and the prevalence of quantitative performance indicators) seems to be in direct conflict with the aim of providing a quality customer service (see Figure 2.5 below), which, paradoxically, happens to be the very reason and purpose for contact centres to exist (Banks & Roodt, 2011; Gilmore, 2001; Houlihan, 2002; Murray et al., 2004; Robinson & Morley, 2006; Wallace et al., 2000).

Figure 2.5: Chain of consequences of the *Taylorisation* of work in contact centres



Note: Adapted from relevant literature on the topics.

2.4 Summary

The unrelenting development of the contact centre industry across the globe does nothing but reflect the increasing growth of the business sector and their need to interact with and support their customers. In an extremely competitive global environment, Scotland's contact centre industry has experienced a continuous development to become a world leader by capitalising on the benefits of a European location characterised fundamentally by its quality-cost ratio. However, its capacity is going to be tested in the form of the incoming technological shift towards omnichannel platforms and the potential impact of ongoing political developments (i.e., Brexit and potential independence referendum), whose consequences may acquire even more relevance in view of the social and economic importance of the sector for Scotland.

Contact centres as workplaces, on the other hand, have attracted increasing academic attention, especially regarding their managerial practices, employment relations, technological challenges, or working conditions, which have even stimulated wider sociological, political, economic, and psychological analyses. Research has actually depicted a working environment oriented towards mastering processes efficiency and employee performance, yet aiming to provide a quality service, and thus generating itself a source of pressure that equally exposes its inner contradiction. In fact, while the industry is entering a more technologically advanced era to increase productivity, which may intensify the pressure on staff as contact centres operations still rely heavily on human intervention.

Therefore, what are the leadership practices implemented in those workplaces facing imminent external challenges and existing inner contradictions?

Chapter 3 – Literature Review

3.1 Introduction

This chapter provides an overview of the leadership field by means of relevant academic literature in order to acquire a comprehensive understanding of the theoretical and empirical leadership research. The chapter is structured into three key themes:

- *leadership*, which involves a brief introduction describing the origins of the leadership phenomenon and its evolution, followed by an examination of the multiple definitions and diverse conceptualisations of the term, to conclude with a discussion on several concepts associated with it;
- *leader*, which addresses the attributes and competences of the leader figure and the differences between leaders and managers highlighted by the leadership research; and
- *leadership practice*, which explores the main leadership theories to be also subject to critical analysis.

Those three themes will ultimately support the development of the research questions, which are shown in section 3.4.6.1, pp. 107-108.

3.2 Leadership: an introduction

Since its origins, associated with the existence of social activity and the further development of social structures, the presence of leadership seems to be parallel to the emergence and development of civilisation, to the extent that it has become part of our evolved psychology (Birnbaum, 2013; van Vugt, Hogan, & Kaiser, 2008; Zaccaro, 2014). In fact, all societies have generated some form of leadership or created myths to explain leaders' dominant role and their subordinates' compliance, showing that, as civilisation advances, leadership will vary in the number of individuals involved and in the diversity of its manifestations in order to adapt to the changes in people's character and conditions (Bass, 1990a; Dowd, 1936; Grint, 2011).

The notion of leadership has formed part of (pre-) human life and evolution since ancient times (see Table 3.1 below), perhaps because leadership has always been present in social species. This has resulted in the emergence of multiple interpretations of leader and leadership practice, constantly replicated and transmitted through myths, legends, fables, or stories that have eventually influenced modern leadership theories (Birnbaum, 2013; Markham, 2012; Zaccaro, 2014).

Throughout History, leadership has been recognised as a powerful resource that has been used both “for incredible good and inconceivable evil” (Day & Zaccaro, 2007, p. 384); but, irrespective of its uses and abuses, the idea has long fascinated academics, thinkers, practitioners, and general public across generations, to the extent that it has become one of the social science’s most examined topics (Day & Antonakis, 2012b) and a “highly valued commodity” (Northouse, 2015, p. 1), as reflected in the broad interest from both individuals and organisations in how to become effective leaders and in leadership capacities, respectively (Argyris, 1976b; Barnard, 1938/1968; Goleman, 1998; Harris et al., 2003; Locke & Allison, 2013; Markham, 2012).

Table 3.1: A Natural History of Leadership

Stage	Time period	Society	Group size	Leadership structure	Leader	Leader-follower relations
1	>2.5 million years ago	Pre-human	Variable	Situational	Any individual, often the dominant group member	Situational or hierarchical (nonhuman primates)
2	2.5 million – 13,000 years ago	Band, clan, tribe	Dozens to hundreds	Informal, expertise-based	Big man, head man	Egalitarian
3	13,000 – 250 years ago	Chiefdoms, kingdoms, warlord societies	Thousands	Centralized, hereditary	Chief, kings, warlords	Hierarchical
4	250 years ago –present	Nations, states, large business	Thousands to millions	Centralized, democratic	Heads of state, CEOs	Hierarchical but participatory

Source: van Vugt (2012), p. 159.

Although the phenomenon has been studied from different approaches (e.g., traits, behaviours, situations, relationships) by applying several research methods (e.g., interviews, observations, documents analysis) and methodologies (e.g., ethnography, case study, phenomenology) in diverse contexts (e.g.,

business, healthcare, education, politics) and on multiple levels of analysis (i.e., individual, dyads, groups, organisations) (Bass, 1990a; Gardner et al., 2010; House & Aditya, 1997; Yammarino & Dansereau, 2011), leadership continues to draw wide attention and captivate the curiosity of inquiring minds, perhaps for its enigmatic nature and its capacity to remain undecipherable (Avolio et al., 2009; Bryman, Collinson, Grint, Jackson, & Uhl-Bien, 2011; Day & Antonakis, 2012b; Rumsey, 2013b; Yukl, 2013).

In fact, despite having been empirically linked both directly and indirectly to numerous and diverse individual/group/organisational outcomes – such as creativity, innovation, sustainability, performance, job satisfaction, or organisational commitment (e.g., Amundsen & Martinsen, 2015; Chiniara & Bentein, 2016; Lin & Chen, 2016; Miao et al., 2013; Waite & Sheehan, 2014) – it is still not clear what is meant by leadership and the extent to which it can actually exert an influence on individuals and/or organisations (Alvesson & Spicer, 2014; Jermier & Kerr, 1997; Rumsey, 2013b; Salancik & Pfeffer, 1977; Western, 2008a). Yet, leadership has usually been regarded as a key factor in the success of any social activity, especially if it involves competition (Statt, 2000), and seems to have become “a catch-all solution for nearly any problem, irrespective of context” (Alvesson & Spicer, 2012, p. 367).

In this regard, the study of leadership has not been devoid of controversies and criticisms, starting with the body of literature itself, defined as “vast and bewildering” (Yukl, 2013, p. 26), “a collection of decontextualized facts” (Hogan & Kaiser, 2005, p. 171), or “an intimidating endeavour” to be comprehended (Day & Antonakis, 2012a, p. 3); but, probably, better described as “complex, confusing, conflicting, and compelling”, where frustration, energy, and inspiration coexist (Campbell, 2013, p. 401).

In addition to the recurrent problem of the lack of a universal definition and the different conceptualisations for understanding the term (i.e., trait, process, assigned, emergent) (Northouse, 2015; Rost, 1991; Yukl, 2013), the history of leadership research has been characterised by some well-known features:

- differing views on the nature of the phenomenon (i.e., as a source of authority, coercion, control, persuasion, or power) (Follet, 1995a, 1995b, 1995c; Hollander, 2013; Western, 2008b);
- a disparity of styles and ill-defined constructs (e.g., spiritual leadership, collective leadership) that reveal a certain theoretical anarchy within the field, making it appear disorganised or unformed (Day, 2014b; Rumsey, 2013b);
- inconclusive empirical research findings difficult to interpret, what has prompted calls asking to abandon the study of leadership (Collinson, 2011; Washbush, 2005);
- methodological weaknesses/issues or research limitations (e.g., lack of validity/reliability of data collection methods, the need to distinguish from different levels of analysis) (Day, 2014b; Lord & Dinh, 2012);
- the predominance of quantitative over qualitative or mixed methodologies, and the prevalence of the Positivist paradigm to study leadership (Bryman, 2004, 2011; Gardner et al., 2010);
- the need to establish valid causal inferences with individual and organisational outcomes (e.g., effectiveness) (Antonakis, Bendahan, Jacquart, & Lalive, 2010; Day, 2014b; Yukl, 2013);
- the little attention to research on leadership development (as a practical application of theory) to enhance individuals' and organisations' leadership capacity (Day, Fleenor, Atwater, Sturm, & Mckee, 2014; DeRue & Myers, 2014; Garavan, Watson, Carbery, & O'Brien 2016);
- the advent of anti-leadership claims that questioned its existence and/or effects (Alvesson & Spicer, 2012; Alvesson & Sveningsson, 2003; Argyris, 1979; Lakomski, 2008; Miner, 1975;), or just perceived leadership as a social construction based on *followers'* perceptions to which they attach a heroic and romantic view or a symbolic meaning (Calder, 1977; Meindl, Ehrlich, & Dukerich, 1985; Pfeffer, 1977); and
- even by the disagreement on the extent of academic progress: while some authors consider that the accumulated knowledge has been satisfactory and helps to explain the nature, antecedents, and consequences of leadership

(Avolio et al., 2009; Day & Antonakis, 2012a; House & Aditya, 1997; Rumsey, 2013b); others believe that progress has been insufficient and slow, the meaning of leadership remains elusive, and our overall understanding of the phenomenon is incomplete and based on “shaky foundations” (Alvesson & Spicer, 2014, p. 41; Collinson, 2011; Lord & Dinh, 2012; Yukl, 2013).

The last few years have been characterised by an increasing vitality within the field driven by methodological advances (e.g., sample survey, content analysis, field studies) (Gardner et al., 2010); an emerging interest on particular issues, such as ethics, gender, identity, or culture (e.g., Chaturvedi, Zyphur, Arvey, Avolio, & Larsson, 2012; Demirtas, 2013; Ford, 2010; Guetterman & Mitchell, 2015); and the advent of new theories and approaches (e.g., complexity, relational theories) that have opened new lines of investigation (Uhl-Bien, 2006; Uhl-Bien & Marion, 2011).

Beyond their potential theoretical contributions and practical applications, those latest developments represent another stage of evolution in the long history of studying the phenomenon, and confirm that the notion of leadership continues evolving in order to adapt to the needs generated by the rapidly-changing environments, increased task complexity, technological sophistication, and the turbulent and uncertain social and economic conditions of current times (McCarthy & Sheehan, 2014; Markham, 2012; Mohrman & Lawler III, 2014). It is precisely that constant evolution what has prompted the emergence of multiple definitions and conceptualisations of the term, which will be examined in the following section.

3.2.1 Definitions and conceptualisations. There is not a widely accepted definition of leadership “and might never be found” (Day & Antonakis, 2012a, p. 6). Despite more than a century of accumulated knowledge of theoretical study and empirical research, scholars and researchers have not been able to articulate a definitive and comprehensive account that clearly explains the concept and captures the essence of this elusive and enigmatic construct (Rumsey, 2013b; Yukl, 2013). Instead, “there are almost as many different definitions of leadership as there are persons who have attempted to define the concept” (Stogdill, 1974, p. 7), and many of those definitions are ambiguous, complex, or share little in

common, what may have dissipated the meaning of the concept (Alvesson & Spicer, 2014; Birnbaum, 2013; Burns, 1978). As a result, many studies do not even include a definition of leadership, so researchers focused on different aspects in their investigations whose analyses yielded consequently disparate results (Rost, 1991; Yukl, 2013).

Nevertheless, such diversity allows to identify a historical development of leadership definitions (Rost, 1991). Early definitions of leadership, such as “a combination of qualities” that enables an individual to persuade others to accomplish a given task (Tead, 1929, p. 149; Bass, 1990a) or “the centralization of effort in one person as an expression of the power of all” (Blackmar, 1911), highlighted personal qualities and a single individual source of leadership. In the 1940-1950s, leadership was described as “the process (act) of influencing the activities of an organized group in its efforts toward goal setting and goal achievement” (Stogdill, 1950, p. 3) or “the behavior of an individual when he is involved in directing group activities” (Hemphill, 1949), noting the relevance of individual behaviours within groups. Further accounts defined the concept as an “interpersonal influence, exercised in a situation, and directed, through the communication process, toward the attainment of a specified goal or goals” (Tannenbaum, Weschler, & Massarik, 1961, p. 2), acknowledging the role of relationships and the context or situation in the leadership process; or as “the particular acts in which a leader engages in the course of directing and coordinating the work of his group members” (Fiedler, 1967, p. 36), emphasising again leaders’ behaviours in groups.

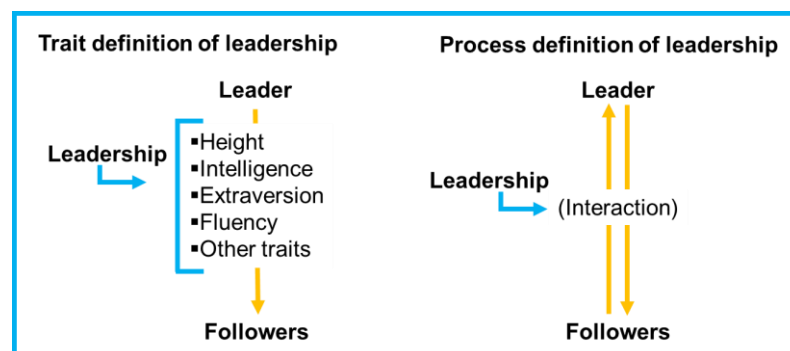
Those trends would shift in the 1980-1990s as a result of the emergence of Transformational Leadership, whose style stressed change and a higher purpose as reflected in “an influence relationship among leaders and followers who intend real changes that reflect their mutual purposes” (Rost, 1991, p. 102) or “a process in which leaders and followers raise one another to higher levels of morality and motivation” (Burns, 1978, p. 20). More recent accounts, in contrast, suggest a “process of influencing others [...] [and] of facilitating individual and collective efforts to accomplish shared objectives” (Yukl, 2013, p. 7); a “complex interactive dynamic from which adaptive outcomes (e.g., learning, innovation, and adaptability) emerge” (Uhl-Bien et al., 2007, p. 298); or a “dynamic, unfolding,

interactive influence process among individuals” (Pearce et al., 2009, p. 234), which highlight the collective nature, dynamic relational process, contextually situated practice, and dialectical influence-based approach of leadership (Denis, Langley, & Rouleau, 2010).

This proliferation of definitions reflect the consistent academic interest in the topic, but also reveal conflicting conceptualisations of leadership according to Northouse’s (2015) framework:

- either as a *trait*-based property, whereby leadership is based on innate qualities and thus restricted to certain people (e.g., Carlyle, 1841; Galton, 1869); or as a *process*, whereby leadership is developed in the context of social interactions and can be learnt; therefore, it can be potentially performed by multiple individuals (e.g., Crevani, Lindgren, & Packendorff, 2010; Uhl-Bien, 2006) (see Figure 3.1 below); and

Figure 3.1: Trait and process leadership



Source: Northouse (2015), p. 9.

- as an *assigned* position, so the leadership role is formally allocated (e.g., Bass, 1985; House, 1976); as opposed to an *emergent* phenomenon: i.e., the leadership role is derived from a positive response towards an individual’s behaviour (e.g., Gronn, 2000; Pearce & Conger, 2003b).

For the purposes of this research, leadership will be considered “a process whereby an individual influences a group of individuals to achieve a common goal” (Northouse, 2015, p. 6), since such definition condenses three elements present in multiple accounts that describe a common view of leadership (Day & Antonakis, 2012a; Hemphill & Coons, 1957; Hollander, 2013; Rost, 1991; Stogdill, 1950; Yukl, 2013):

- a *process of influence* based on persuasion, whereby an individual exerts an impact on others in an interactive rather than in an one-way linear manner; in this regard, “an individual’s effort to change the behaviour of others is attempted leadership. When the other members actually change, this creation of change in others is successful leadership” (Bass, 1990a, p. 13);
- a *group context*, which implies that leadership cannot occur without the interaction with other individuals; and
- a focus on *common goals*, whose accomplishment constitutes effective leadership.

That definition and understanding of leadership shaped the current study since it set the scope of the research and allowed a focus on the key areas to be explored (i.e., leadership, leader, and leadership practice), but also helped to distinguish those areas that were not relevant for the purposes of this research.

3.2.2 Related concepts. The concept of leadership has usually been related implicitly or explicitly to authority, coercion, control, persuasion, or power (Gronn, 2003b; Kotterman, 2006; Northouse, 2015; Western, 2008b). Overall, there has been a lack of agreement to establishing relationships between all those concepts; Grint (2005), for instance, conceived leadership as a form of authority; whereas Edwards, Schedlitzki, Turnbull & Gill (2015) understood the concept in terms of power.

Most contemporary leadership scholars regard leadership as an influence process – i.e., an exercise of persuasion rather than of coercion or control – that involves leaders and followers interacting with each other (Bass, 1990a; Haslam, Reicher, & Platow, 2011; Hogg, 2010; Hollander, 1985; Northouse, 2015; Yukl, 2013).

Some authors (Burns, 1978; Gordon, 2002; 2011; Janda, 1960; Raven, 1993; Zogjani, Llaci, & Elmazi, 2014), instead, have approached leadership as an influence process based on power, whereby an individual cannot become a leader without power, then understanding the concept similarly to “the ability to make things happen, to be a causal agent, to initiate change” (Follett, 1995b, p. 101). Power can be defined as “the capacity to influence the attitudes and

behavior of people in the desired direction” (Yukl, 2013, p. 216), but also to deprive or punish unilaterally for not complying with such influence, and its scope depends on whether/how it is perceived by others and they respond accordingly (Hollander, 2013). Either way, individuals holding power may use it to exert an influence on others and thus exercise leadership (Bass, 1990a; Lunenburg, 2012).

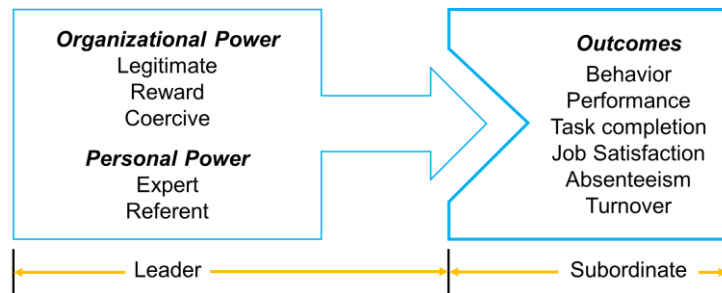
Although confusingly interrelated, power should be distinguished from control, i.e., “power exercised as means toward a specific end” (Follett, 1941, p. 99) or a “self-generating process” involving the coordination of people, tasks, and situation (Follett, 1995c, p. 226); and from authority, i.e., “legitimate power” (Grint, 2005, p. 1475). As authority emanates from a legitimated role or position, it is not resisted because it is expected and accepted, increasing consequently leaders’ control (Follett, 1995a; Pfeffer, 1981; Western, 2008b). In that case, authority should not be linked to leadership but to management since the latter is based on the legitimacy conferred by an employment contract, which equally grants power (Grint, 2005; Gronn, 2003b; Lunenburg, 2012). In sum, each concept denotes the exercise of influence to varying degrees but also conveys negative connotations, particularly power and authority for being usually related to control and coercion (Western, 2008b).

Bass (1990b) identified only *personal* (i.e., derived from expertise) and *positional* power (i.e., stemmed from hierarchical position), while Etzioni (1961) outlined *coercive* (based on control and threats of *physical* sanctions), *remunerative* (based on control over *material* resources and rewards), and *normative* power (based on allocation of *symbolic* rewards). French & Raven (1959) noted, instead, that leaders could exert in their relationships with subordinates several forms of power that could potentially result in diverse outcomes (e.g., Elias, 2007; Krause, 2015; Liao, 2008; Lunenburg, 2012; Reiley & Jacobs, 2016) (see Figure 3.2 below):

- *referent*, based on the identification with the leader (e.g., charisma);
- *expert*, stemming from a leader’s expertise and knowledge;
- *reward*, grounded on the leader’s capacity to provide rewards;
- *coercive*, based on the leader’s ability to punish for noncompliance; and

- *legitimate*, derived from the leader's position of authority within an organisation.

Figure 3.2: Sources of a leader's power



Source: Lunenburg (2012), p. 5.

Informational power, based on leaders' capacity to convince someone with logical arguments and/or clear information (i.e., persuasion) or to exert control over the access to information, was omitted in the original model but eventually included in further developments (Elias, 2008; Eyuboglu & Atac, 1991; Raven, 1993). Several sources of power can be present to different degrees in a relationship, but *referent* power as the most usual source has not been empirically supported (Elias, 2007; Krause, 2015; Reiley & Jacobs, 2016).

Although French & Raven's (1959) model has been extensively applied (e.g., Albrecht, Holland, Malagueño, Dolan, & Tzafrir, 2015; Liao, 2008; Reiley & Jacobs, 2016), their sources of power were found to be highly correlated to each other and their theoretical basis as well as their capacity to capture all dimensions of power were questioned (Bass, 1990b; Blois & Hopkinson, 2013), which diminishes the validity and further applicability of the model.

Power has also been regarded as "the ability to exert a degree of control over persons, things, and events, even without having concern for them" (Hollander, 2013, p. 133) and denotes an intentional purpose and an asymmetric influence relationship based on coercion (Stogdill, 1974). However, genuine power is not based on coercive but coercive control; in other words, *power-over* (i.e., the power of someone over others) differs from *power-with* (i.e., power based on co-action) as the latter involves a reciprocal influence which contributes to effective leadership (Follett, 1941).

Therefore, power, if perceived as “the combined capacity of the group” (Follett, 1927, p. 221), can be exerted collectively rather than being concentrated on a single/few individual/s. Follet’s framework has been replicated using similar terms, although the field is dominated by manifestations of *power over* in the exercise of leadership (Hollander, 2013):

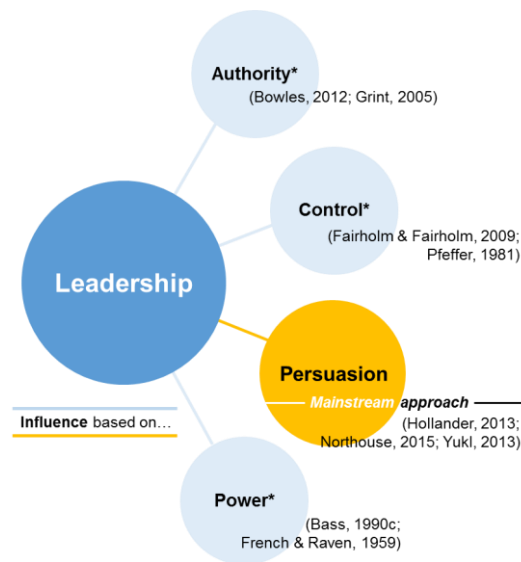
- *power over* (i.e., to compel or dominate others) from *power from* (i.e., ability to resist the power of unwanted demands from others) and *power to* (i.e., empowerment) (Hollander & Offerman, 1990);
- *power through* and *power with* from *power over* (Dunlap & Goldman, 1991); or
- transactional (i.e., *power-over*) from transformational leadership (e.g., *power-to*) (Lovaglia, Lucas, & Baxter, 2012).

To conclude, it should be noted that the leadership literature has generally adopted an apolitical approach to power by neglecting power relations analysis. It has been argued that, even if organisations implemented new working practices, policies, and structures to foster *power with*, they would likely fail since individuals’ relationships and behaviours would still be influenced by long-standing hierarchical power relations characterised by *power over* (e.g., Gordon, 2011; Lumby, 2013; Youngs, 2009a).

3.2.3 Summary. Leadership has been defined and conceptualised in multiple ways, and generally related to concepts such as authority, coercion, control, power, and persuasion, yet conceived mainly as an influence based on the latter. While scholars have mostly analysed the links with power, specific studies investigating explicitly the linkages of leadership with authority and control or exploring conjointly the relationships of all constructs have been largely overlooked, thus maintaining the confusion regarding their interrelationships.

Although there exist a conceptual overlap to different degrees, the current mainstream approach suggests that some of those concepts (i.e., authority, coercion, control, and power) should be considered different from that of leadership (see Figure 3.3 below), but the differences and interrelationships should be supported by empirical research and not only by theoretical positions.

Figure 3.3: Concepts related to the idea of leadership



Note: Adapted from relevant literature on the topic.

3.3 Leader

The previous discussion on the notion of leadership raises the need to inquire about an inherently related concept: the leader. In a similar vein to leadership, the concept of leader has been described in multiple ways, giving rise to numerous and diverse accounts of the concept. Consistent with the definition of leadership explained above and adopted in this research (section 3.2.1, p. 46), a leader will be considered an individual who “influences the behaviour of group members in the direction of goals with which the group is faced” (Parry & Bryman, 2006, p. 447). That notion also implies the existence of an *influence process*, a *group context*, and *shared goals* (Day & Antonakis, 2012a; Northouse, 2015).

3.3.1 Attributes and competences. Attributes are regarded as traits or personal characteristics, and have been usually grouped into patterns to develop a specific profile that helps identify leaders (Day & Zaccaro, 2007; Judge et al., 2004a; Zaccaro et al., 2004). Trait theories (further discussed in section 3.4.1) represent an illustrative example of that practice, although the innumerable and diverse patterns derived from empirical research and further reviews (e.g., Stogdill, 1948; Mann, 1959; Bass, 1990a; Kirkpatrick & Locke, 1991; Lord, De

Vader, & Alliger, 1986/2007; Zaccaro et al., 2004) have added more confusion rather than clarity in order to recognise the attributes that characterise leaders.

Competences are “bundles of leadership-related knowledge, skills, and abilities” (Day, 2012b, p. 119). As noted by Storey (2004), competency frameworks comprise the required leadership skills and behaviours to identify and develop a competent leader (Bolden et al., 2003; Foti & Hauenstein, 2007; Hollenbeck et al., 2006; Lord & Hall, 2005). Skills and behaviours are intrinsically interconnected since the latter relies on the former. As it is assumed that those skills or capabilities can be developed, they also provide “a bridge” (Day, 2012b, p. 119) between trait and behavioural theories, although a time frame for acquisition and/or development has not yet been specified.

Multiple models (see Table 3.2 below) have been designed to identify the key competences that help develop individual leadership capacity in practice and, eventually, increase leadership effectiveness (e.g. Alavosius et al., 2017; Czabanowska et al., 2014; Tuong & Thanh, 2017; Shum et al., 2018).

Table 3.2: Competency models

Authors	Skills			
Bennis and Thomas (2002)	<i>Ability to engage with others in shared meaning</i>	<i>Distinctive and compelling voice</i>	<i>Sense of integrity</i>	<i>Adaptive capacity to different situations</i>
Day et al. (2014)	<i>Intrapersonal skills (i.e., experience and learning, skills, personality, and self-development)</i>	<i>Interpersonal characteristics (i.e., social mechanisms and Authentic Leadership) to develop their leadership capacity</i>		
Mumford et al. (2000)	<i>Complex problem-solving</i>	<i>Solution construction</i>	<i>Social judgment</i>	
Storey (2004)	<i>Big picture sensemaking, which involves assessing the organisations' strengths and weaknesses; scrutinising and interpreting the environment to identify the threats to, and opportunities for, the organisation; and providing a vision, a mission, and a strategy</i>	<i>Inter-organisational representation, which focuses on developing partnerships with other organisations</i>	<i>Ability to deliver change, which requires to mobilising the organisations' resources, providing support for followers through training and development in order to empower them to take decisions, and developing emotional intelligence.</i>	

(Continued on the next page).

Table 3.2: Competency models (continued)

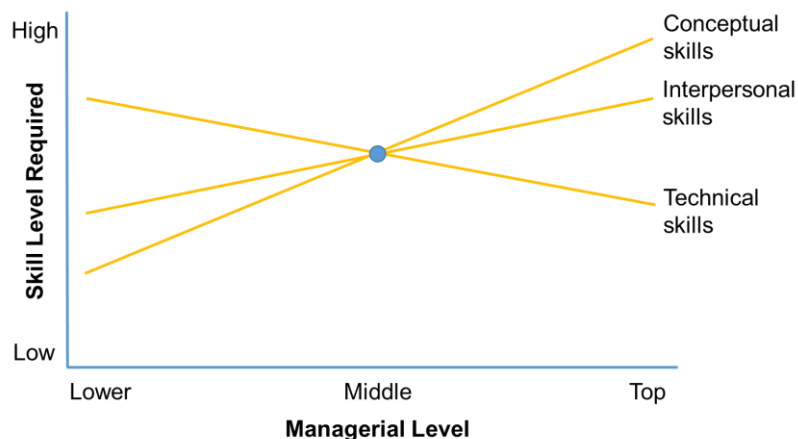
Authors	Skills		
Zaccaro et al. (2013)	<i>Cognitive:</i> e.g., direction-setting, problem-solving, decision-making capacity, flexibility, planning, self-regulation	<i>Social:</i> e.g., ability to deal with different kinds of people, communication skills, training and developing subordinates, coordinating and controlling, supporting and motivating others, conflict management and resolution, developing trust and respect, understanding others' feelings and motives	<i>Self-motivational:</i> e.g., willingness to increase responsibilities and motivation to lead, taking charge of complex situations and environments, handling stress, self-esteem & confidence

Note: Adapted from Bennis & Thomas (2002); Day, Fleenor, Atwater, Sturm & McKee (2014); Mumford Zaccaro, Connelly & Marks (2000); Storey (2004); Zaccaro, LaPort & José (2013).

Yukl (2013), interestingly, associated categories of leadership skills to different managerial levels (see Figure 3.4 below):

- *technical*, which comprise knowledge about methods and processes, products and services, or the organisation itself (e.g., structure, rules, management systems);
- *interpersonal*, which require an understanding of others' feelings, establishing relationships, or communication skills; and
- *conceptual*, which include analytical or problem-solving skills.

Figure 3.4: Relative importance of skills for different levels of management



Source: Yukl (2013), p. 154.

Day (2012), on the other hand, highlighted two key models that complemented each other, suggesting that leaders may need to implement both to be effective (see Table 3.3 below):

Table 3.3: Two views on essential leadership skills requirements

Leadership Strataplex	Mumford, Campion, & Morgeson (2007)	Developable leadership capabilities	Van Velsor & McCauley (2004)
General skills	Subskills	General capabilities	Subskills
Cognitive	Speaking, active listening, writing, reading comprehension, active learning	Self-management	Self-awareness, ability to balance conflicting demands, ability to learn, leadership values
Interpersonal	Social perceptiveness, coordination, persuasion	Social	Ability to build and maintain relationships, ability to build effective work groups, communication skills, ability to develop others
Business	Management of material resources, operations analyses, management of personnel resources, management of financial resources	Work facilitation	Management skills, ability to think and act strategically, ability to think creatively, ability to initiative and implement change
Strategic	Visioning, systems perception, identification of consequences, identification of key causes, problem identification, solution appraisal		

Source: Day (2012), p. 120.

Those sets of competences proposed by different authors overlap each other, which may indicate the need to develop a standard framework in order to clearly identify leaders' attributes and competencies.

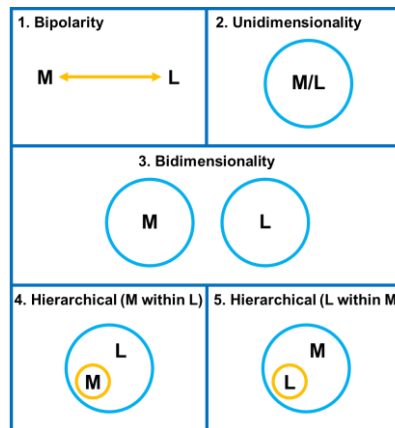
3.3.2 Leaders and managers. The concept of leadership has usually been associated with, mistaken for, or used indistinctly as, the concept of management and, by extension, the same has applied to the leader-manager dichotomy. There is a plethora of studies discussing the similarities and differences between leaders and managers; but, after more than forty years since the emergence of this recurrent and controversial debate, the literature on the topic has not yet provided a definitive answer (Bass, 1990c; Nienaber, 2010; Toor & Ofori, 2008). Scholars have applied disparate criteria to differentiate both concepts (Kotter, 1990; Storey, 2011; Statt, 2000; Rost, 1991; Kent, 2005; Edwards, Schedlitzki, Turnbull, & Gill, 2015; Toor, 2011; Zaleznik, 2004). Kotter (1990, 2001) sustained that managers produce consistency and order to cope with complexity, while leaders deal with organisational changes caused by rapid environmental shifts (e.g., technology, competition) in order to adapt and compete successfully;

otherwise, “activities of mastering routines” to achieve efficiency versus “activities of vision and judgement” to attain effectiveness, respectively (Bennis & Nanus, 1985, p. 21). Consequently, managers are concerned with the “purposive organization and direction of resources to achieve a desired outcome” (Rost, 1991, p. 137), involving the achievement of goals through people, which can be based on authority but also on control (Fairholm & Fairholm, 2009; Grint, 2005; Lunenburg, 2011).

In general, five approaches have been identified describing leadership/leaders and management/managers (see Figure 3.5 below):

1. as opposite concepts (i.e., *bipolarity*) regarding values, processes, and purposes since managers focus on practical and problem-solving tasks, coordinating activities, and maintaining order, as opposed to leaders, who provide a vision, develop personal relationships, and seek for social change (e.g., Bennis & Nanus, 1985; Zaleznik, 2004);
2. as equivalent (i.e., *unidimensionality*), because it is not possible to differentiate clearly leaders from managers since they share common tasks (e.g., commanding, coordinating, controlling, planning, and organising) (e.g., Barnard, 1938; Drucker, 1955/2007; Fairholm & Fairholm, 2009; Follett, 1996; Nienaber & Roodt, 2008);
3. as distinct but complementary processes (i.e., *bidimensionality*) that can actually be combined to influence organisational performance (e.g., Kent, 2005; Kotter, 1990; Kotterman, 2006; Yukl & Lepsinger, 2005);
4. as leadership encompassing management, reflected in leadership functions and behaviours such as *initiating structure*, *directive behaviour*, *strategic operational leadership*, *strategic management functions of executive leadership*, *transactional leadership*, or *administrative leader* (Bass, 1985; Fleishhman, 1953a; Gardner & Schermerhorn, 1992; Hersey & Blanchard, 1969; Wortman, 1982; Uhl-Bien et al., 2007); and
5. as management comprising leadership (Mintzberg, 1973; Quinn, 1988; Stewart, 1982; Tett, Guterman, Bleier, & Murphy, 2000).

Figure 3.5: Five perspectives on management (M) and leadership (L)



Source: Simonet & Tett (2013), p. 201.

Among them, the *bidimensionality* perspective has been the most endorsed by leadership scholars and researchers as it acknowledges the independence of leaders and managers but also their complementarity, showing that they are not mutually exclusive and both are necessary in organisations (Algahtani, 2014; Kotter, 1990; Toor, 2011; Young & Dulewicz, 2008).

Irrespective of academic controversies, a key aspect should be noted: both concepts have different origins. Leadership has been present in human activity since ancestral times (Birnbaum, 2013; van Vugt, 2012; Zaccaro, 2014), and its study – which might have begun with the *Kyropaidia* by Xenophon (370 B.C.) as “the first systematic book on leadership” (Drucker, 2007, p. 137) – has yielded a significant amount of literature (Avolio et al., 2009; Bryman et al., 2011; Rumsey, 2013a; Yukl, 2013); whereas management, in contrast, is a relatively new phenomenon resulting from the increasing size and task complexity of organisations, and its body of research is much more limited (Kotter, 2001; Kotterman, 2006; Wren, 2005).

Although they have been used interchangeably, share some similarities, and their conceptual notions may be blurred, leaders and managers should be clearly distinguished from each other based on their differing definitions, conceptualisations, functions, behaviours, and, ultimately, purposes (Bass, 1990c; Rost, 1991; Toor, 2011).

3.4 Leadership practice

An overview of the leadership research permits to identify numerous theories and several approaches, whose emergence seems to be triggered as a response to the weaknesses found in their respective precedents in their aim to explain the concept (Parry & Bryman, 2006). The different interpretations of the large body of leadership research have led to multiple classifications based on different criteria (e.g., characteristics of leaders, followers, or situation; time period and productivity) and using diverse terminology (e.g., schools, historical threads, theories, trends, styles, approaches, perspectives, paradigms) that may lead to confusion, especially when the periods of active study of leadership theories overlap each other (Bass, 1990a; Day, 2012; Day & Antonakis, 2012a; Parry & Bryman, 2006; Storey, 2011; Yukl, 2013).

In order to address the most important theoretical contributions in the study of leadership, this research will follow a taxonomy that condenses the key theories on which most classifications coincide into five major and distinguishing leadership approaches chronologically organised (Bryman et al., 2011; House & Aditya, 1997; Northouse, 2015; Statt, 2000; Storey, 2011):

- Trait approach (e.g., Stogdill, 1948);
- Behavioural approach (e.g., Blake & Mouton, 1964);
- Contingency approach (e.g., Fiedler, 1964);
- ‘*New Leadership*’ theories (e.g., Avolio & Gardner, 2005); and
- Emerging perspectives (e.g., Uhl-Bien, 2006).

Each of those approaches represents a shift on research focus rather than the disappearance of their respective precedents (Parry & Bryman, 2006).

3.4.1 Trait approach. The trait approach, which is comprised of ‘Great Man’ and Trait theories, assumed that leadership was based on personality attributes, qualities, or characteristics only possessed by certain individuals (Bono, Winny, & Yoon, 2014; Zaccaro, 2007). The term traits – often regarded as a source of confusion and conflict in the leadership literature – will be considered as “relatively stable and coherent integrations of personal characteristics that foster a consistent pattern of leadership performance across a variety of group and organizational situations” (Zaccaro, Kemp, & Bader, 2004, p. 104), including

personality, expertise, temperament, skills, motives and values, and cognitive abilities as personal characteristics that promote consistent leadership behaviour and effectiveness (Day & Zaccaro, 2007; Yukl, 2013).

3.4.1.1 'Great Man' theories. Usually portrayed as a prelude of Trait theories and as an expression of the cult of personality (Day & Antonakis, 2012a; Bass, 1990a; Haslam et al., 2011), 'Great Man' theories appeared in the nineteenth and early twentieth centuries arguing that leadership was based on naturally endowed personality traits transferred across generations by means of inheritance (Carlyle, 1841; Cattell, 1890, 1903; James, 1880/2014). Galton (1869), for instance, examined about four hundred illustrious men applying statistical analysis on samples of top University students, families' peerages, and relevant personalities (e.g., Seneca, Newton) to conclude that genius was hereditary and, therefore, inheritance determined leadership capacity. Hence, this approach implicitly assumed that "leaders were born, not made" (Barton, 1925, p. 83) and, consequently, leadership practice could not be learnt or developed.

By virtually ignoring remarkable women, 'Great Man' theories emphasised the concept of the individual male leader (e.g., Odin, Shakespeare) depicted as a hero or genius who possessed unique qualities and whose acts led societies to changes and evolution from generation to generation (Cox, 1926; Ellis, 1904; James, 1880/2014; Jennings, 1960), assuming that masses were influenced and led by "the superior few" (Dowd, 1936, p. 151).

Contrary to that rationale, some authors (Bingham, 1927; Craig & Charters, 1925/1941; Tead, 1935; Tralle, 1925) argued that leadership personal qualities could actually be taught and improved through organised training or developed through exercise. That position challenged directly the inheritance-based view of the 'Great Man' Theory, which denied that leadership traits could be nurtured, and introduced a conception of personal traits as fluid rather than immutable characteristics that would contribute to develop Trait theories (Carlyle, 1841; Day & Zaccaro, 2007; Terman, 1904). Nevertheless, research on 'Great Man' theories has not completely vanished and there are still contemporary studies supporting the emergence of leadership based on genetic influences (e.g., Arvey, Zhang, Avolio, & Krueger, 2007; Ilies, Gerhardt, & Le, 2004).

3.4.1.2 Trait theories. Considered as the beginning of the scientific study of leadership, Trait theories did not deny necessarily that leadership traits were inherited and also maintained that leaders possessed some distinguishing characteristics that followers lacked (Day & Antonakis, 2012a; Kirkpatrick & Locke, 1991; Northouse, 2015); but, unlike 'Great Man' theories, those were not restricted to a few great people and could definitely be acquired and cultivated (Bingham, 1927; Tralle, 1925).

In consequence, Trait theory studies focused on the examination of specific individual qualities, such as intelligence, appearance, knowledge, or emotional control, which seemingly determined individuals' ability to exercise leadership (Bowden, 1926; Caldwell, 1920; Dunkerley, 1940; Terman, 1904), despite the existence of contradicting results in some cases (Goodenough, 1930; Cox, 1926; Tryon, 1939).

Early studies. Terman (1904) identified some qualities that differentiated leaders from non-leaders (e.g., verbal fluency, intelligence, goodness) in what is considered the first empirical study of leadership (Zaccaro et al., 2004).

Following this "constellation-of-traits" approach (Gibb, 1954, p. 914), a plethora of publications and studies emerged during the first half of the twentieth century providing multiple and varied sets of personality attributes observed in *leaders* (Allport, 1924; Bernard, 1927; Bogardus, 1934; Bowden, 1926; Browne, 1951; Kleiser, 1923; Page, 1935; Shartle, 1949; Viteles, 1932).

Early and further reviews of those studies resulted in new categories of leadership traits, such as those by Smith & Krueger (1933), Stogdill (1948), Gibb (1954), Mann (1959) (see also Bass, 1990a; Judge, Bono, Ilies, & Gerhardt, 2002; Keeney & Marchioro, 1998; Kirkpatrick & Locke, 1991; Lord, De Vader, & Alliger, 1986/2007; Stogdill, 1974; Zaccaro et al., 2004, for further reviews), being intelligence and extroversion the most commonly cited ones (Zaccaro, LaPort, & José, 2013). This variety of trait classifications and categories indicates that most early researchers, rather than developing conceptual models or explaining leadership processes, adopted a more descriptive stance that led to an excess of attributes that does not provide a consistent account to explain how leaders really differed from followers or non-leaders (Calder, 1977; Zaccaro et al., 2004).

Paradoxically, and most importantly, those studies equally helped to understand that leadership was derived from the situation since personal traits or attributes “could not be sustained consistently across different leadership situations” (Zaccaro et al., 2004, p. 105), which suggests that different leadership skills and traits were required in different situations (Bird, 1940; Ghiselli & Brown, 1955; Gibb, 1954; Murphy, 1941). Thus, the conclusions of those studies, particularly from Stogdill’s (1948) and Mann’s (1959) influential reviews, did not only cause the Trait perspective to lose its relevance, but also triggered a shift in leadership research, which moved from personal traits towards leadership behaviours as foci of analysis (Northouse, 2015). Nevertheless, it should be noted that further reviews (Judge et al., 2002; Keeney & Marchioro, 1998; Lord et al., 1986/2007) concluded that Stogdill’s (1948) and Mann’s (1959) results had been misinterpreted and personality traits were more consistently associated with leadership perceptions than the literature had acknowledged (Zaccaro et al., 2004).

Key models. There are various models that have attracted wide attention as trait-based theories to explain leadership emergence and/or effectiveness. Although their traits are generally regarded as desirable, they also have the capacity to become undesirable and even counterproductive for organisations (Cogliser, Gardner, Gavin, & Broberg, 2012; Judge, Piccolo, & Kosalka, 2009; Petrides, 2010).

The Five-Factor Model

Despite the existence of several alternatives (Digman, 2011; Foti & Haustein, 2007), the Five-Factor Model (FFM) or *Big Five* (see Table 3.4 below) has been the most widely used model to explain the role of personality traits as predictors of leadership (Goldberg, 1990; McRae & Costa, 1999; Norman, 1963; Tupes & Christal, 1961/1992). However, its descriptive rather than explanatory character, the reduced number of dimensions to explain human personality, and the lack of validity and reliability of the factor analysis have been criticised, casting doubts on its capacity to capture the personality structure (Block, 2001; McAdams, 1992; Pervin, 1994).

Table 3.4: Big Five Personality Factors

Neuroticism	The tendency to be depressed, anxious, insecure, vulnerable, and hostile
Extraversion	The tendency to be sociable and assertive and to have positive energy
Openness	The tendency to be informed, creative, insightful, and curious
Agreeableness	The tendency to be accepting, conforming, trusting, and nurturing
Conscientiousness	The tendency to be thorough, organized, controlled, dependable, and decisive

Source: Northouse (2015), p. 27.

Nevertheless, the FFM has achieved more academic consensus than previous trait-based leadership theories (e.g., Mann, 1959; Stogdill, 1948), but empirical research is not conclusive: while some studies have found a significant relationship between separate and joint dimensions of personality and leadership (Guerin et al., 2011; Leung & Bozionelos, 2004), many others – including studies involving non-western cultures (e.g., Khaireddin, 2015; Zopiatis & Constanti, 2012) – have not entirely supported the link or found it too weak, raising doubts about the consistency of the relationship between the FFM dimensions and leadership (Bono & Judge, 2004; Cogliser et al., 2012; Colbert, Judge, Choi, & Wang, 2012; Reichard et al., 2011).

Emotional Intelligence

In contrast with the FFM framework, focused essentially on the identification of one's and/or others' perceptions of traits (e.g., Dizén & Berenbaum, 2011), the Emotional Intelligence (EI) model highlights the internal processes taking place within the individuals' minds prior to being externally manifested through adapted behaviour (e.g., problem-solving) (Mayer & Salovey, 1997; Salovey & Mayer, 1990). Considered a subset of social intelligence, i.e., the ability to understand and manage people and to act wisely in human relations (Thorndike, 1920), EI is rooted in Gardner's (1983) *intrapersonal* and *interpersonal intelligence* concepts, and refers to:

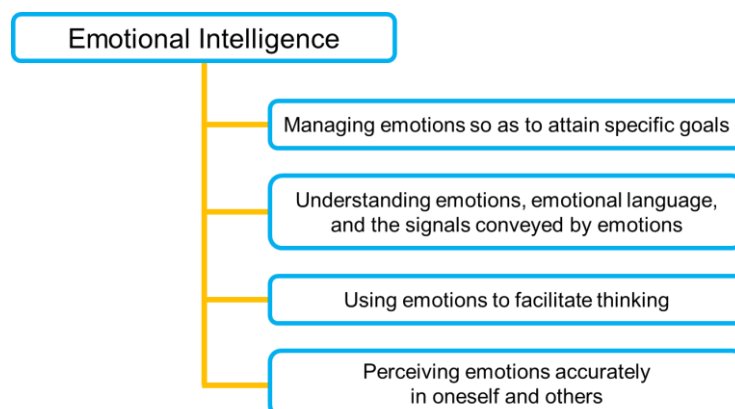
...the ability to perceive accurately, appraise, and express emotion; [...] to access and/or generate feelings when they facilitate thought; [...] to understand emotion and emotional knowledge; and [...] to regulate emotions to promote emotional and intellectual growth (Mayer, Salovey, & Caruso, 2008b, p. 10).

In practical terms, the EI process reflects individuals' ability to understand their own and others' emotions and further apply the processed information to guide their thinking and behaviour in real life situations and problem-solving tasks; thus, organisational members' degree of EI will vary according to their individual capacity to perform properly that process (Cherniss, 2010b; Mayer et al., 2008b; Salovey & Mayer, 1990).

However, since its appearance, EI has triggered an endless debate regarding the nature of the construct, its definition, operationalisation, measurement, validity, relationships with outcomes, or even its utility or terminology, which casts serious doubts on the existence of the phenomenon (Antonakis et al., 2009; Cherniss, 2010a; Føllesdal & Hagtvet, 2013; Locke, 2005; Matthews, Emo, Roberts, & Zeidner, 2006; Matthews, Zeidner, & Roberts, 2007; McCleskey, 2014; Petrides, 2011; Roberts, Schulze, & MacCann, 2008; van Rooy, Whitman, & Viswesvaran, 2010; Walter, Cole, & Humphrey, 2011). Although the concept was originally regarded from a psychological perspective as a group of mental abilities/skills, the development of EI studies gave rise to two research streams based on the conceptualisation of the construct and represented by several models (Fernández-Berrocal & Extremera, 2006; Petrides, 2011; Walter et al., 2011):

- as mental abilities (i.e., *ability EI*) (see Figure 3.6 below) (e.g., Daus & Ashkanasy, 2005; Mayer, Roberts, & Barsade, 2008a); or
- as a combination of mental abilities and personality traits (i.e., *trait EI*) (e.g., Cherniss, 2010a; Petrides, Furnham, & Mavroveli, 2007).

Figure 3.6: The Four-Branch Model of Emotional Intelligence (Mayer & Salovey, 1997)



Source: Mayer, Salovey & Caruso (2008b), p. 507.

To complicate matters, each research stream has applied different measurement instruments (e.g., Emotional Intelligence Test; Emotional Quotient Inventory) and methods (e.g., self-report, other-reports, interviews) equally criticised by their lack of validity and reliability, raising concerns on whether those studies are actually measuring the same construct or whether the term is covering too many ideas (Austin, 2010; Cherniss, 2010b; Mathews et al., 2006, 2007; Petrides et al., 2007; Roberts et al., 2008).

In addition, some authors (Petrides et al., 2010; van der Linden, Tsaousis, & Petrides, 2012) have found an overlap between EI and personality traits, revealing a potential redundancy in research that would require a review of the construct components to be distinguished from other personality models (e.g., *Big Five*). Nevertheless, both research streams should be considered complementary rather than contradictory (Foster & Roche, 2014) provided that EI can also be regarded as “a constellation of behavioral dispositions and self-perceptions concerning one’s ability to recognize, process, and utilize emotion-laden information” (Petrides & Furnham, 2003, p. 40).

While the importance of EI for leaders to be successful has been regularly highlighted (Garavan, McGarry, Watson, D’Annunzio-Green, & O’Brien, 2015; Goleman, 1996, 1998; Goleman, Boyatzis, & McKee, 2013), empirical research exploring the relationship between EI and leadership have yielded contradictory results, probably due to the conflicting views noted above regarding the instruments’ validity and reliability to measure the construct (McCleskey, 2014; Walter et al., 2011). Thus, some studies associated EI with leadership emergence or practice (Côté, Lopes, Salovey, & Miners, 2010; Foster & Roche, 2014; Lopez-Zafra, Garcia-Retamero, & Martos, 2012), but others did not establish such association (Føllesdal & Hagtvet, 2013; Lindebaum & Cartwright, 2010; Weinberger, 2009), reflecting the need to clearly define the construct and to establish valid and reliable measurement instruments.

Bright and dark traits

Both the Big Five and Emotional Intelligence represent models based on *bright* traits (i.e., socially desirable) as opposed to *dark* traits of personality (i.e., socially undesirable) (Bono et al., 2014; Judge et al., 2009). While bright traits (e.g.,

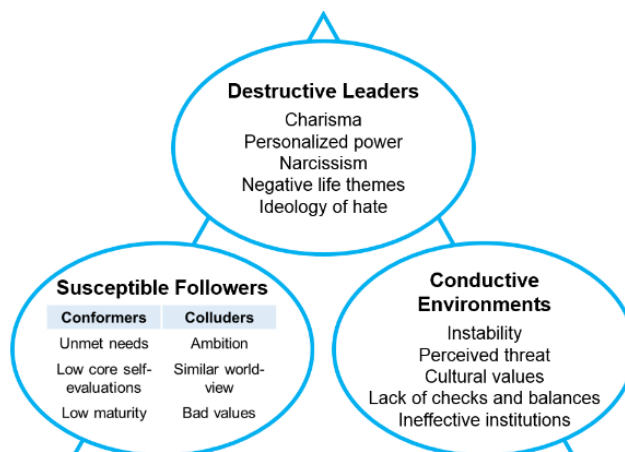
extraversion, adaptability) normally predict successful leadership, dark traits (e.g., narcissism, Machiavellianism) usually result in:

- leadership derailment (Goleman et al., 2013; Judge et al., 2009; McCleskey, 2013; Spain, Harms, & LeBreton, 2013), i.e., “being involuntarily plateaued, demoted or fired below the level of expected achievement or reaching that level but unexpectedly failing” (Burke, 2006, p. 92); or
- destructive leadership, i.e., “intentional or unintentional leaders’ behaviours which result in negative outcomes for and organization or its employees” (Wang et al., 2010, p. 75), which actually encompasses leadership derailment (Einarsen, Aasland, & Skogstad 2007; Padilla, Hogan, & Kaiser, 2007).

Destructive leadership has been associated with *laissez-faire*, *supportive-disloyal*, *derailed*, and *tyrannical* leadership styles. The literature indicates that is caused by the interaction of leaders’ and followers’ characteristics with environmental factors (Aasland, Skogstad, Notelaers, Nielsen, & Einarsen, 2010; Einarsen et al., 2007; Krasikova, Green, & LeBreton, 2014; Wang et al., 2010), forming a *Toxic Triangle* whose dynamics generate negative consequences and/or outcomes for individuals and organisations (see Figure 3.7 below).

Thus, leaders’ selection and regular assessments, followers’ empowerment and development, and control-focused contextual measures (e.g., ethical behaviour culture, accountability policies) become paramount to prevent or minimise destructive leadership effects (Padilla et al., 2007).

Figure 3.7: The toxic triangle: elements in three domains related to destructive leadership



Source: Padilla, Hogan & Kaiser (2007), p. 180.

The peculiarity of bright and dark traits resides, however, on their ability to transform themselves into their opposite, for which some traits considered bright in some situations can be counterproductive in others and become dark traits, and vice-versa (see Table 3.5 below), which creates *trait paradoxes* that highlight the influence of context on leadership (Judge et al., 2009).

Table 3.5: Paradoxical effects of leader individual differences on leader emergence or leadership effectiveness

Trait Social Desirability	Actual Effects in Specific Context or Situation	
	Bright effect	Dark effect
Bright trait	<p>Socially desirable trait has positive implications for leaders and stakeholders</p> <p><i>Example:</i> Conscientious leaders displays high ethical standards in pursuing agenda in long-term interest of organization.</p>	<p>Socially desirable trait has negative implications for leaders and stakeholders</p> <p><i>Example:</i> Conscientious leader has difficulty adapting strategy when confronted with environmental turbulence.</p>
Dark trait	<p>Socially undesirable trait has positive implications for leaders and stakeholders</p> <p><i>Example:</i> Narcissistic leader's self-confidence causes him/her to emerge from chaotic context when no one else is willing to assume responsibility.</p>	<p>Socially undesirable trait has negative implications for leaders and stakeholders</p> <p><i>Example:</i> Narcissistic leader manipulates reward structure (e.g., stock price based on granted options) to personal advantage at long-term expense to organization.</p>

Source: Judge & Long (2012), p. 188.

Bright and dark traits have been profusely investigated in relation to leadership, particularly the FFM bright traits, intelligence, and charisma (e.g., Judge et al., 2004a; Judge et al., 2009; Sy, Choi, & Johnson, 2013); while research on dark traits have mainly focused on narcissism, histrionic personality, social dominance, and Machiavellianism (e.g., Haynes, Hitt, & Campbell, 2015; Judge, LePine, & Rich, 2006; Nicol, 2009; Sendjaya, Pekertel, Härtel, Hirst, & Butarbutar, 2016). Overall, their existence stresses the importance of selection and hiring procedures for organisations to identify individuals' bright and dark sides (Judge & LePine, 2007; Spain et al., 2014).

Latest developments. After past periods of decline or inactivity, this leader-centric approach "is still alive and well" (Germain, 2012, p. 33), considering the increasing proportion of published articles (see Table 3.6 below) and the regular appearance of trait-based theories and studies (e.g., Colbert et al., 2012; Hoffman, Woehr, Maldagen-Youngjohn, & Lyons, 2011; Walter & Scheibe, 2013).

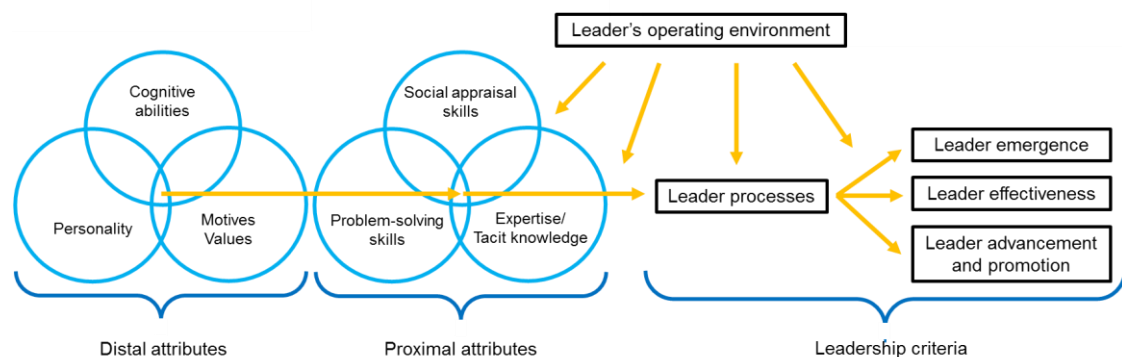
Table 3.6: Total number of articles involving leader traits published in Leadership Quarterly

	1991-1995	1996-2000	2001-2005	2006-2010	2011-2014
Total number of articles with leader traits	6	10	8	20	25
Total number of articles published	180	225	296	397	339
Percentage	3.3%	4.4%	2.7%	5.0%	13.3%

Source: Xu, Fu, Xi, Zhang, Zhao, Cao, Liao, Li, Xue & Ge (2014), p. 1097.

The latest developments in Trait theory take the form of dynamic frameworks and integration models (DeRue, Nahrgang, Wellman, & Humphrey, 2011; Xu et al., 2014; Zaccaro, 2007). Some researchers have distinguished between *trait-like* traits (i.e., relatively stable so they do not vary across time or contexts) and *state-like* (i.e., specific to certain situations and more malleable across time and contexts), also known as distal and proximal traits, respectively, depending on their influence on outcomes (Chan & Drasgow, 2001; Chen, Gully, Whiteman, & Kilcullen, 2000; Hough & Schneider, 1996). Based on Mumford, Zaccaro, Harding, Fleishman, & Reiter-Palmon (1993) and Mumford, Zaccaro, Harding, Jacobs, & Fleishman (2000) research, Zaccaro et al.'s (2004) multistage model (see Figure 3.8 below) comprises distal traits acting as the foundation for the emergence and development of proximal traits, which mediate the influence of distal traits on leader processes.

Figure 3.8: A model of leader attributes and leader performance



Source: Zaccaro, Kemp & Bader (2004), p. 122.

Their effective combination is required in order to exert such influence, which will subsequently impact on leadership outcomes (Gentry et al., 2013; Hendricks & Payne, 2007; van Iddekinge, Ferris, & Heffner, 2009). Additionally, the effects of proximal traits on leadership processes and their further effects on leadership

outcomes are moderated by situational variables (e.g., group expertise, organisational structure, innovation culture, degree of formalisation), which can either restrain or inhibit leadership practice (Zaccaro, 2007; Zaccaro et al., 2004).

The innovation of Zaccaro et al.'s (2004) model resides on three aspects:

- the combination of personality traits (e.g., intelligence, extroversion) with other attributes (i.e., cognitive abilities, motives, expertise, problem-solving skills) to explain leadership emergence (Gentry et al., 2013);
- the dynamism inferred by situation influences (e.g., innovation culture) on proximal traits and leadership processes (Mumford et al., 2000); and
- the distinction between stable (*trait-like*) and more malleable (*state-like*) traits to respond appropriately to different situation requirements and ensure effective leadership performance (van Iddekinge et al., 2009).

Although it has not been empirically tested to assess its effectiveness, Zaccaro et al.'s (2004) framework shows how the influence of *state-like* traits on leadership processes is moderated by situational factors, assuming that those traits can be altered through experience, maturation, or training (Zaccaro, 2007). This particularity implies that the framework can be useful to identify individuals who can perform consistently over a period of time if they exhibit certain distal traits (Chen et al., 2000).

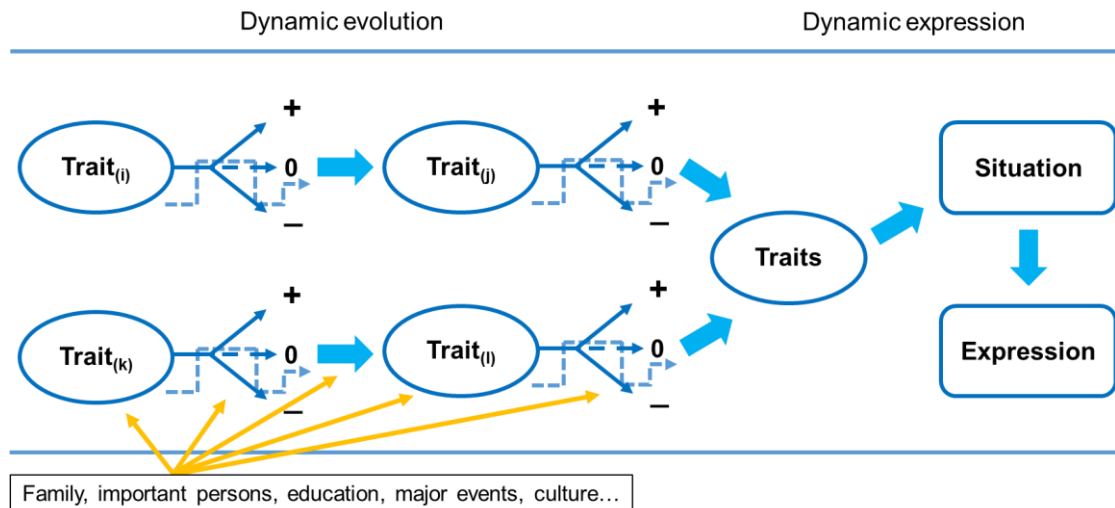
By applying a different approach, Xu et al. (2014) sustained that leaders' traits evolve over time and are expressed differently in different situations. For example, Trait_(i) and Trait_(k) can evolve:

- in intensity (i.e., *intrinsic* traits, such as proactive) and become stronger (“+”) or weaker (“-“), or rarely remain neutral (“0”); and
- in nature (i.e., *extrinsic* traits, such as gentle) and be replaced over time by Trait_(j) and Trait_(l), respectively (see Figure 3.9 below).

Those changes can be triggered by internal (e.g., leader's own learning) or external factors (e.g., family, education, culture), and, as a leader becomes more experienced, she/he will select the most convenient trait/s for each situation in order to guarantee leadership effectiveness, thus depicting a process which

highlights the dynamic nature of leader traits in contrast to prior static trait theories (e.g., Mann, 1959; McRae & Costa, 1999; Salovey & Mayer, 1990).

Figure 3.9: A dynamic model of leader traits

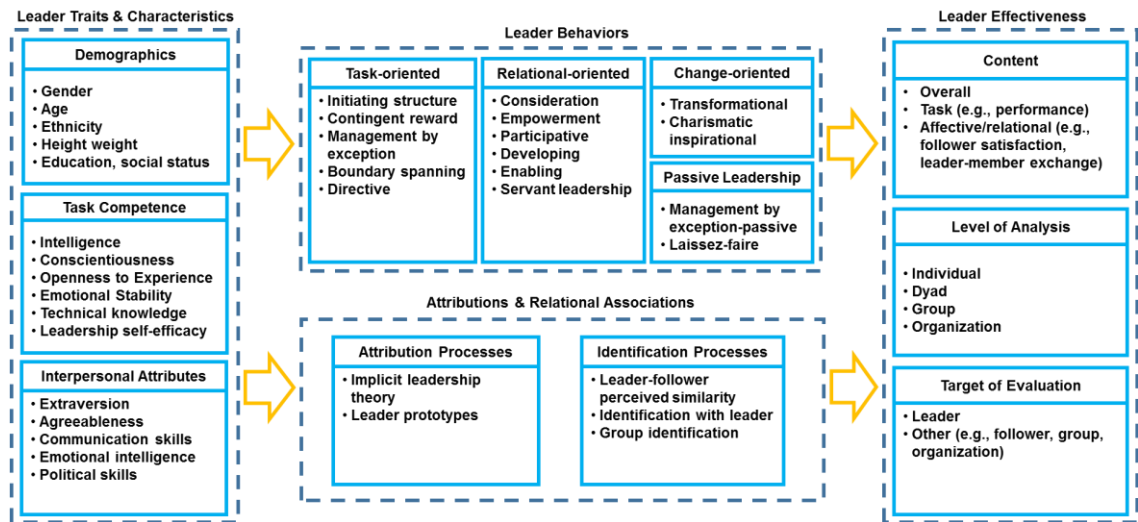


Source: Xu, Fu, Xi, Zhang, Zhao, Cao, Liao, Li, Xue & Ge (2014), p. 101.

In terms of practical applications, the effective integration of leaders' traits and situational factors described in this model allows, for instance, to identify those individuals who can perform effectively in changing situations since their dynamic traits can adapt to variable circumstances (Xu et al., 2014).

Both Zaccaro et al.'s (2004) and Xu et al.'s (2014) models deal with recent concerns regarding the need to provide trait leadership theories a more flexible and dynamic approach in order to adapt to changing environments (Dinh & Lord, 2012; Fleeson & Jayawickreme, 2015; Yukl & Mahsud, 2010). Nevertheless, in order to address the lack of theoretical integration in the leadership literature (Dansereau, Seitz, Chiu, Shaughnessy, & Yammarino, 2013; House & Shamir, 1993; Larsson & Eid, 2012), DeRue et al. (2011) proposed an integrated model of leader traits (i.e., demographics, task-competences, personality attributes) and behaviours (i.e., task-oriented, relationships-oriented, change-oriented) to assess their combined effectiveness (i.e., leader effectiveness, group performance, follower job satisfaction, follower satisfaction with leader) (see Figure 3.10 below).

Figure 3.10: An integrated model of leader traits, behaviors, and effectiveness



Source: DeRue, Nahrgang, Wellman & Humphrey (2011), p. 10.

Overall, DeRue et al.'s (2011) model supported an integration of leadership traits and behaviours to explain leadership effectiveness (e.g., Blickle et al., 2013), although leaders' behaviours exerted a much higher influence than traits on leadership effectiveness, which suggests that organisations should focus on developing leaders' behaviours as they are more important predictors of successful leadership. However, the model also revealed a lack of influence in some combinations of leadership traits and behaviours, exposing theoretical and empirical limitations and the need to perform further research to identify effective configurations.

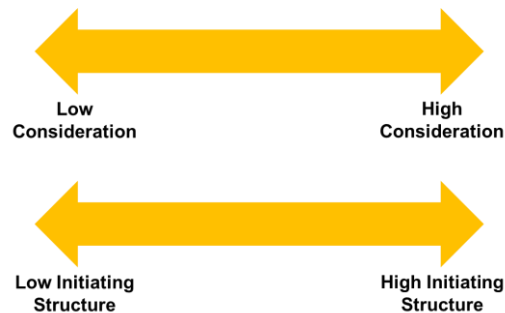
3.4.1.3 Summary. The Trait approach conferred scientific rigor to the study of leadership and its static approach evolved into more dynamic models. Irrespective of the influence of behavioural or situational factors, this perspective should not be completely ignored in the study of leadership since it cannot be denied that *leaders* possess certain qualities that differentiate them from followers. Therefore, the influence of personality traits should still be considered a potential factor playing a role in leadership emergence and effectiveness.

However, the evidence indicates that personal traits and attributes alone are not sufficient to explain the leadership phenomenon, so the focus of leadership research shifted to the analysis of leaders' behaviours, which follows below.

3.4.2 Behavioural approach. The limitations and criticisms of the Trait approach moved academic attention towards research on leadership behaviours, initiated by The Ohio State University and the University of Michigan in the late 1940s and continued with McGregor's (1960) and Blake & Mouton's (1964) theories in the 1960s.

3.4.2.1 The Ohio State studies. By applying diverse questionnaires as research instruments (Halpin, 1957; Fleishman, 1957a, 1957b; Shartle, 1957; Stogdill, 1963), the Ohio State studies identified two main leadership behaviours conceived as independent dimensions (see Figure 3.11 below):

Figure 3.11: The Ohio dimensions displayed in two independent continuums



Note: Adapted from Fleishman (1951, 1953); Halpin & Winer (1952); Harris & Fleishman (1955).

- *consideration*, centred on relationships (i.e., building mutual trust and respect for subordinates' ideas and consideration of their feelings); and
- *initiating structure*, focused on task performance (i.e., defining and structuring roles and responsibilities towards goal attainment) by directing group activities through scheduling, communicating information, or planning (Fleishman, 1961; Fleishman & Peters, 1962).

The combination of both dimensions can result in four leadership behaviours (Hersey et al., 2013), whose validity as leadership dimensions and their relationship with outcomes (e.g., follower satisfaction and motivation; individual performance) has been acknowledged (DeRue et al., 2011; House, Filley, & Kerr, 1971; Judge et al., 2004b; Misumi & Perterson, 1985, 1987; Rowold, 2011). However, some authors have contested:

- the validity of only two dimensions to explain leadership behaviours, especially when they should not be considered basic but multidimensional

constructs (Schriesheim, Kinicki, & Schriesheim, 1979; Stogdill, Goode, & Day, 1962; Tracy, 1987);

- the lack of independence between both dimensions, whose correlation would indicate that leaders cannot perform simultaneously *high* or *low* on both (Lowin, Hrapchak, & Kavanagh, 1969; Weissenberg & Kavanagh, 1972);
- the validity and reliability of the instruments employed to measure leaders' behaviours (e.g., SBDQ, LBDQ, LBDQ-XII, LOQ) (Korman, 1966; Schriesheim, House, & Kerr, 1976; Szilagyi & Keller, 1976); and
- the disregard of contingent variables (e.g., leaders' organisational independence, competence) that affect both leadership behaviours (Kerr, Schriesheim, Murphy, & Stogdill, 1974; Sherwood & DePaolo, 2005).

Overall, that evidence questions the suitability of *consideration* and *initiating structure* to fully describe leadership behaviours, and, consequently, the findings of the studies applying both dimensions. Irrespective of those issues, further research has showed that leaders' behaviours characterised by low *consideration* and high *initiating structure* lead to group grievances and turnover, dysfunctional behaviour, and counterproductive work behaviour (Fleishman & Harris, 1962, 1998; Holtz & Harold, 2013; Otley & Pierce, 1995); while high *consideration* and high *initiating structure* foster trust in team members' creativity and favourable perceptions of justice (Holtz & Harold, 2013; Jo, Lee, Lee, & Hahn, 2015).

Some authors (Larson, Hunt, & Osborn, 1976; Schriesheim, 1982), in contrast, considered the ideal *high-high* configuration a myth since each dimension alone could explain most outcomes, contradicting extensive research and beliefs on the topic (Brown & Dalton, 1980; Chengyan, Lili, & Qiang, 2013; Tien & Chao, 2012) and, ultimately, raising doubts on the *high-high* configuration as the *best* leadership style. Likewise, *consideration* and *initiating structure* exert individually differing influences on diverse outcomes (Chiu & Chen, 2012; Judge et al., 2004b; Piccolo et al., 2012), suggesting the need for further research to clarify the effect of each dimension separately.

3.4.2.2 The Michigan studies. The Michigan studies recognised two leadership behaviours similar to the Ohio State dimensions: production centered,

which emphasises technical and production aspects of job (i.e., task-focused); and employee centered, concerned with employees' training, support, interests, and motivation (i.e., relationship-focused) (Kahn & Katz, 1952; Katz, Maccobi, & Morse, 1950; Katz et al., 1951). However, unlike the Ohio State research, the Michigan studies initially regarded both leadership behaviours as two opposite ends on a single continuum (i.e., leaders can only display higher levels of one behaviour and lower levels of the other) and their balance was determined by the requirements of the situation (see Figure 3.12 below). This approach would later change and both dimensions would eventually be regarded as independent (Kahn, 1960).

Figure 3.12: The Michigan dimensions displayed in a single continuum



Note: Adapted from Kahn & Katz (1952); Katz, Maccobi, Gurin & Floor (1951); Katz, Maccobi & Morse (1950).

In a similar vein, Harvard University studies on small groups identified two leader roles to ensure their internal equilibrium (Bales, 1950, 1953): *task leaders*, focused on providing orientation, giving suggestions, and problem-solving; and *socio-emotional leaders*, who provide employees support, solidarity, and tension release. A leader could perform one role or the other, but not both simultaneously (Bales, 1958; Bales & Slater, 1955; Slater, 1955).

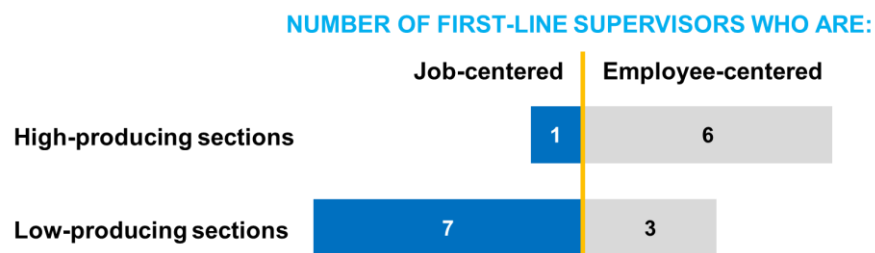
In an early review of the Michigan studies, Cartwright & Zander (1953) concluded that leadership functions in groups were directed towards:

- *goal achievement*, which involved the manager clarifying the plan and goals to group members, keeping them focused, facilitating expert information, and assessing the work; and
- *group maintenance*, which required the manager to establishing interpersonal relationships, managing conflict, providing support, and stimulating participation and interdependence among members.

Both behaviours could be implemented simultaneously. Similarly, Likert (1961) differentiated *employee-centered supervision* (i.e., focused on subordinates'

problems and concerns, and on building effective work groups by applying general supervision) from *job-centered supervision* (i.e., focused on organising subordinates' tasks and controlling their performance to maximise productivity by applying close supervision), showing that *employee-centered* supervisors tended to achieve higher performance groups than *job-centered* supervisors (see Figure 3.13), as illustrated by several studies in different contexts (e.g., Kahn & Katz, 1952; Katz et al., 1950, 1951).

Figure 3.13: “*Employee-centered*” supervisors are higher producers than “*job-centered*” supervisors

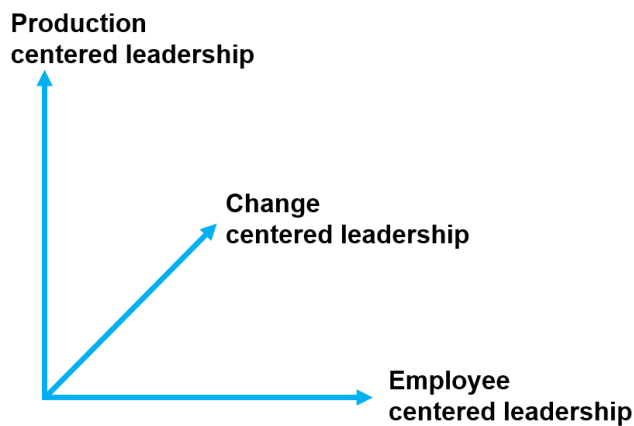


Source: Likert (1961), p. 7.

The same result applied to workers subject to general supervision (i.e., *employee-centered supervision*), who displayed higher levels of productivity than those under close supervision (i.e., *job-centered supervision*) (Katz et al., 1950). Based on similar outcomes, different organisational performance levels can be associated with several management systems (based on the level of control exercised by an organisation over its members) and depicted on a continuum, showing how more participative leadership systems usually achieved higher performance levels than more authoritative ones (Likert, 1961, 1967). This may ultimately suggest that a specific leadership style (System 4) – focused on enhancing participation and relationships with employees – can actually provide the best results for organisations.

The Michigan two-dimensional model was further expanded with a third dimension (i.e., *change orientation*) (see Figure 3.14 below) that describes managers with a risk-taking, creative, and prone-to-change attitude derived from the need to adapt to fast-changing global competitive environments and customers' needs (Arvonen, 2002; Ekvall, 1991; Ekvall & Arvonen, 1991, 1994).

Figure 3.14: The CPE Leadership Model



Source: Ekvall & Arvonen (1991), p. 25.

The third dimension found extensive support. DeRue et al. (2011), for instance, found that change-oriented and relational-oriented behaviours were associated with Transformational Leadership. Managers performing *high* in all three leadership styles were perceived more competent and efficient than those exhibiting lower scores (Arvonen & Ekvall, 1999; Ekvall & Arvonen, 1994; Hansson & Andersen, 2007; Norris, 2010). That finding showed evidence of a *high-high-high* configuration that exceeded the previous *high-high* pattern and defied its perception as a myth (Larson et al., 1976; Misumi, 1985; Schriesheim, 1982).

The dimensions identified in the Ohio and Michigan studies were eventually combined in a four-factor model comprised of four leadership dimensions (Bowers & Seashore, 1966): *support* (i.e., enhancing personal worth), *interaction facilitation* (i.e., encouraging close and collaborative relationships), *goal emphasis* (i.e., commitment to group goals and performance), and *work facilitation* (i.e., coordinating, planning, resource provision). Although the model was empirically tested, it provided varying results in different contexts (Bowers, 1975; Taylor, 1971), raising doubts on its reliability and validity to reflect leadership behaviours and to establish relationships with outcomes.

Nevertheless, the dimensions highlighted by those studies seem to have a correspondence, showing that different terms may refer to the same concept (Bowers & Seashore, 1966).

3.4.2.3 Theory X and Theory Y. Borrowing mainly from Maslow’s (1954) Hierarchy of Needs and Herzberg et al.’s (1959) Two-Factor theories, but also from Taylor’s (1911) employer-employee cooperation or Follett’s (1924) ‘power-with’ and management-labour integration, among others (Carson, 2005), McGregor (1957, 1960) distinguished between Theory X – the predominant view in management practice – from Theory Y – an integrative management approach (see Table 3.7 below) – to actually reflect the incongruences between individual and organisation’s needs (Argyris, 1957, 1973; Likert, 1961).

Table 3.7: Theory X and Theory Y

Theory X	Theory Y
Management has little trust or confidence in workers	There should be shared decision making between workers and employers so workers have a say in the decisions that influence them
Workers prefer to be closely supervised	Workers will direct themselves if they are committed to the organization and the job is satisfying
Communication in flows down, not up	Workers possess the ability for problem solving and creative thinking
Subordinates have little say regarding their jobs and do not participate in problem solving	Workers seek responsibility and want to be challenged
Subordinates do not participate in or feel responsible for organizational success	Workers feel rewarded from their accomplishments and doing a good job
In order to meet organizational goals, managers use threats and coercion to gain compliance	Workers are self-motivated and require little supervision
Without precise supervision, employees will underperform	Workers are motivated by recognition and acknowledgment

Source: Noland (2014), p. 146.

The former assumes that employees inherently dislike work and avoid taking responsibilities, lack ambition and enough intellectual capacity and, therefore, prefer to be led; in consequence, managers may apply close supervision, punishment, coercion, threats, and rewards (ranging from a *hard* to a *soft* approach) to direct employees’ activities and modify their behaviour according to organisational needs (Argyris, 1957; Bobic & Davis, 2003; Gannon & Boguszak, 2013). Theory Y, in contrast, conceives work as a potential source of satisfaction for employees, who possess the capacity for development and motivation to assume more responsibilities (Carson, 2005; Kochan, Wanda Orlikowski, & Cutcher-Gershenfeld, 2002); thus, management involves practices such as decentralisation and delegation, job enlargement, participation and consultation

in decision-making, mutual performance appraisal, and reliance on employees' self-control and self-direction in order to develop employees' commitment and accomplish organisational objectives (Argyris, 1957; Burke, 2011; Sorensen & Minahan, 2011). Ultimately, managers with a Theory Y orientation intend to provide the necessary conditions for employees (e.g., clarifying job requirements, setting objectives, assessing performance), including satisfaction of esteem and self-actualisation needs (Maslow, 1954) to "achieve their own goals best by directing their own efforts toward organizational objectives" (McGregor, 1957, p. 12) – a similar approach to *management by objectives* (Drucker, 2007) – and thus integrate synergistically employees' and organisation's aims (McGregor, 1967).

Although McGregor's ideas and values regarding Theory Y have been increasingly applied in modern organisations, and even replicated in strategies for leadership learning and change (e.g., Model II) (e.g., Argyris, 1976a), his model has been misinterpreted on being conceived as two opposite managerial practices or leadership styles. Instead, it should be regarded as an instrument to ponder core assumptions and underlying beliefs about human nature (e.g., attitudes, behaviours, motivation) at the workplace, to further adopt the most effective managerial behavioural approach and thus meet organisational goals (Carson, 2005; Gannon & Boguszak, 2013; Heil, Bennis, & Stephens, 2000; Kochan et al., 2002).

Critically speaking, it has been noted that Theory Y may actually conceal stronger forms of control (e.g., positive reinforcement towards organisational goals) than Theory X, its influence on organisations has been overestimated, and it has no relationship with job performance (Fiman, 1973; Mekker, 1982; Michaelsen, 1973; Thomas & Bostrom, 2010; Wynne & Nord, 1978). In addition, Theory Y may not be universally applicable, and practices based on it (e.g., participative management) may be difficult to implement consistently or may not represent the most fruitful approach for Theory Y to be developed (Burke, 2011; Hofstede, 1980; Morton, 1975; Oh, 1976). Surprisingly, after more than fifty years since its formulation, instruments to measure McGregor's (1960) Theory XY managerial attitudes and behaviours towards employees continue to be developed and tested to provide construct-validity (Kopelman, Prottas, & Davis, 2008; Kopelman, Prottas, & Falk, 2010, 2012; Michaelsen, 1973; Neuliep, 1987, cited

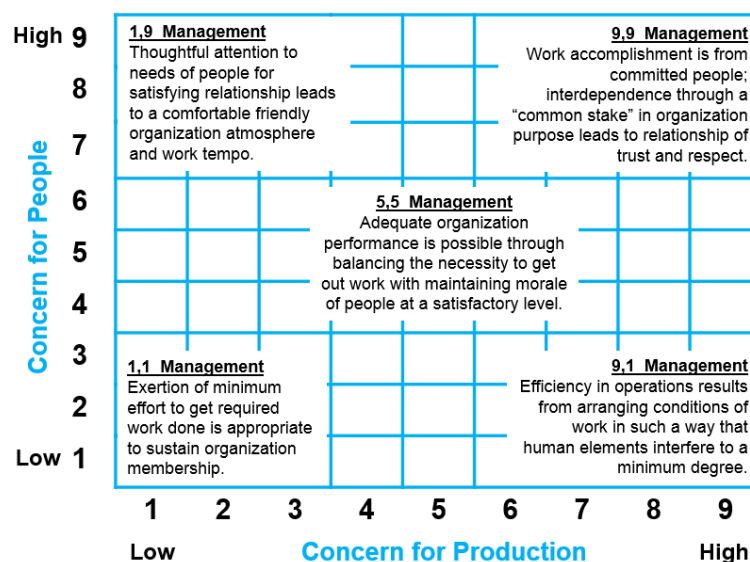
in Sager, 2008), raising doubts on what exactly has been studied as Theory XY to date.

In contrast, Sorensen & Minahan (2011) have predicted the increasing influence of Theory Y across cultures as Western values continue to extend globally, and extensive research has established a positive relationship of Theory Y with Transformational Leadership; perceptions towards employee participation; employees' affective commitment, satisfaction with the leader and organisational citizenship behaviours; or job satisfaction (Gürbüz, Şahin, & Köksal, 2014; Fiman, 1973; Pastor & Mayo, 2008; Russ, 2011; Sahin, 2012).

This evidence does not only undermine criticisms regarding the value of McGregors' model, in general, but also acknowledges the relevance of Theory Y principles, in particular, in contemporary organisations. Beyond the practical application of his theory, McGregor's legacy came to highlight the importance of manager-subordinates relationships and the influence of human dynamics in organisations (Carson, 2005; Gannon & Boguszak, 2013; Lerner, 2011).

3.4.2.4 The Managerial Grid Model. In line with previous research, Blake & Mouton (1964) distinguished *concern for production* (i.e., emphasis on productivity) and *concern for people* (i.e., consideration towards employees' needs and issues) as dimensions whose combinations result in five main managerial behaviours (see Figure 3.15 below).

Figure 3.15: The Managerial Grid



Source: Blake & Mouton (1964), p. 10.

Each of them share a hierarchy dimension or “the boss aspect” (Blake & Mouton, 1964 p. 8), which refers to the managerial responsibilities and decision-making regarding people and production (e.g., Čudanov & Jaško, 2012).

The model – further developed into the Leadership Grid and also adapted for academic administration, entrepreneurial strategies, and, especially, conflict management – helps managers/leaders to define the aspects of people and production in each situation and, based on their assumptions, select the most suitable course of action in order to increase their managerial competence (Blake & Mouton, 1985; Blake, Mouton, & Williams, 1981; Dunphy, 1996; Lewicki, Weiss & Lewin, 1992; Rahim, 1983; Sorenson, Morese, & Savage, 1999).

Although age, experience, or gender have no effect on the choice and implementation of leadership styles (Pavlovic, 2015; Thrash, 2012), they can still be influenced by others aspects (i.e., organisation’s [in]formal practices, situational characteristics, one’s values and beliefs, personality, and chance), suggesting that managerial styles “are not fixed” (Blake & Mouton, 1964, p. 14) but are subject to changes in order to adapt to situational characteristics. However, it was also noted the desirability and superior effectiveness of the 9,9 configuration over the others (i.e., Team Management) “as a basic management approach” (Blake & Mouton, 1964, p. 180) to foster staff involvement, participation, and commitment to teamwork in order to achieve high staff creativity, productivity, and morale, suggesting an *ideal* managerial style to aim for in any situation (Blake et al., 1981; Khan, Langove, Shah & Javid, 2015). Conversely, some studies identified different combinations of *task* and *people orientation* as the *best* approach (Chen, 2008; Garg & Jain, 2013).

The managerial grid has been associated with perceived improvements in organisational effectiveness, and positive effects on employee behaviour and performance; and has also been advocated as an effective tool for managing conflict or changing individuals’ attitudes (Khan et al., 2015; Kreinik & Colarelli, 1971; Smith & Honour, 1969). However, some research has not found support for the model as a predictor of managerial effectiveness or conflict-resolution nor of job satisfaction, supervisors’ leadership style, or power relations (Bernardin & Alvares, 1976; Keller, 1978), which – considering that organisational preconditions may also play a role in the success or failure of the Managerial Grid

(Greigner, 1967) – stresses the need for additional research on modern organisations to actually determine its potential.

In conclusion, the sets of leadership dimensions identified in behavioural studies show evident similarities, to the extent that they can be grouped into two categories (see Table 3.8 below): *task-oriented*, focused on defining and facilitating group interactions and activities to complete the work and achieve organisational goals; and *employee-oriented*, concerned with employees' well-being and characterised by building trustful relationships and enhancing employee participation (Bass, 1990a; Stogdill, 1974).

Table 3.8: Classification of leadership dimensions from behavioural studies

Studies	Task-oriented	Employee-oriented
Ohio State studies	Initiating structure	Consideration
Michigan studies	Production-centered	Employee-centered
Harvard studies	Task leader	Socio-emotional leader
Cartwright & Zander (1953)	Goal achievement functions	Group maintenance functions
Likert (1961)	Job-centered supervision	Employee-centered supervision
McGregor (1957)	Theory X	Theory Y
Blake & Mouton (1964)	Concern for production	Concern for people

Note: Adapted from Blake & Mouton (1964); Cartwright & Zander (1953); Halpin & Winer (1952); Katz, Maccobi & Morse (1950); Slater (1955); Likert (1961); McGregor (1957).

The evidence suggests that both leadership behaviours are necessary to different degrees within organisations in order to manage people- and task-related issues.

3.4.2.5 Summary. Behavioural research coincides with outlining two basic leadership behaviours focused on people and task performance which usually generate diverse configurations. Based on the studies above, the behavioural approach considers that there is a universal leadership style that maximises competency or effectiveness and can be applied systematically regardless of the situation. However, the lack of conclusive evidence led some researchers to believe that the most efficient leadership style is the one adapted to the particularities of each situation, which provoked the shift of leadership research in the early 1960s towards contextual aspects.

3.4.3 Contingency approach. Unlike the Behavioural perspective, the Contingency approach acknowledges the influence of contextual factors on leadership behaviours and decision-making, assuming that it is possible to apply a leadership style adapted to the specific characteristics of a given situation (Ayman & Adams, 2012; Osborn, Hunt, & Jauch, 2002; Osborn, Uhl-Bien, & Milosevic, 2014; Yukl, 2011). Among the variety of Contingency theories generated by the leadership literature (see Table 3.9), this section will particularly focus on those that have received more academic attention in leadership studies.

Table 3.9: Comparison of seven Contingency Theories of effective leadership

Contingency Theory	Leader Traits	Leader Behaviors	Situational Variables	Mediating Variables	Validation Results
Path-goal Theory	None	Instrumental, supportive, participate, achievement	Many aspects	A few	Many studies, some support
Situational Leadership Theory	None	Directive, supportive, delegation	Subordinate maturity	None	Few studies, some support
Leadership Substitutes Theory	None	Instrumental, supportive	Many aspects	None	Few studies, inconclusive
LPC Contingency Model	LPC	None	Task structure, L-M relations	None	Many studies, some support
Cognitive Resource theory	Intelligence, experience	Participative	Stress, group ability	None	Few studies, some support
Normative Decision Theory	None	Specific decision procedures	Many aspects	Decision quality and acceptance	Many studies, strong support
Multiple-linkage Model	None	Many specific behaviors	Many aspects	Many	Few studies, some support

Source: Yukl (2013), p. 176.

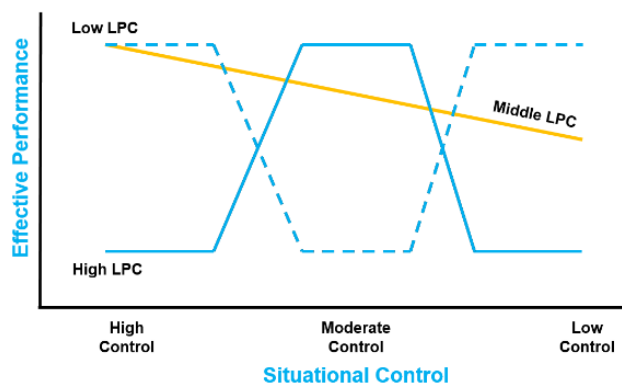
3.4.3.1 Contingency Theory. Using the Least Preferred Co-worker (LPC) scale as measurement instrument (Graen, Orris, & Alvares, 1971a, 1971b; Miller, Butler, & Cosentino, 2004; Rice, 1978; Wearing & Bishop, 1974), the Contingency Model states that group effectiveness is based on the match between the personality attribute (i.e., leadership style) – either relationship- or task-motivated – and the leader’s degree of control and influence over a situation (i.e., situational control), which is determined by three variables:

- *leader-member relations* (i.e., the degree to which the group supports the leader);
- *task-structure* (i.e., the degree to which tasks, performance standards and goals are clearly explained); and

- *control power* (i.e., the leader's capacity/authority to reward or punish subordinates) (Fiedler, 1964, 1967; Fiedler & Chemers, 1974, 1984).

Thus, the interaction of both factors can generate several situations which will lead to different levels of performance; but leaders who are more *relationship-motivated* will be more effective in moderate control situations, while *task-motivated* leaders will be more effective in high and low control situations (Bar-Tal, 1989; Fiedler, 1966; Fiedler & Garcia, 1987; Miller et al., 2004) (see Figure 3.16 below).

Figure 3.16: Schematic representation of the Contingency Model. Leadership performance is shown on the vertical axis, situational control on the horizontal axis. The solid, broken, and darker lines indicate the expected performance of high, low, and middle-LPC leaders respectively under the three situational control conditions.



Source: Fiedler & Chemers (1984), p. 166.

Fiedler's Contingency Model has been subject to extensive scrutiny, and while many studies have ratified its overall validity, others have reported a lack of evidence to support it (e.g., Ashour, 1973a, 1973b; Graen, Orris, & Alvares; 1971; Johnson & Ryan, 1973; Vecchio, 1977) as well as diverse methodological issues and controversies, particularly in relation to:

- the validity and reliability of the LPC scale (Ashour, 1973a; Graen et al., 1971b; Shiflett, 1973);
- the components' construct validity and their interrelationships (e.g., leadership style, situational variables) (Bar-Tal, 1989; Mitchell, 1970); and
- the model's capacity to predict leadership performance (Peters, Hartke, & Pohlmann, 1985).

Those criticisms cast serious doubts on the practical application of the model in organisations, highlighting the need for further academic research (Ayman, Chemers, & Fiedler, 1995; Hill, 1969; Hunt, 1967; Mitchell, 1970).

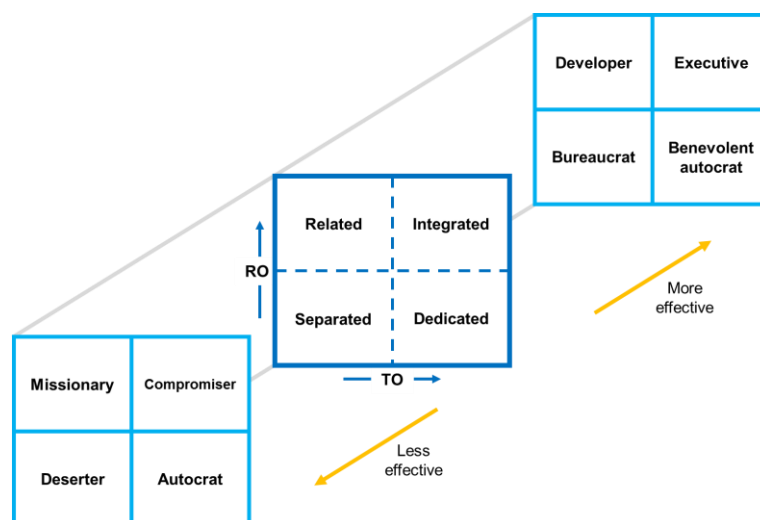
Beyond its key strength – based on “the use of a multi-level [i.e., individual, dyadic, group] and multiple-sources [i.e., leader, subordinate, group, leader’s superior] approach in defining leadership effectiveness” (Ayman et al., 1995, p. 148) – which enables organisational interventions on different groups at different levels, Fiedler’s (1964, 1984) Contingency Model acknowledges that different types of groups are embedded in diverse situations that require different types of leaders, hence the need to adapt leaders’ styles accordingly in order to better manage those situations.

3.4.3.2 Situational Leadership Theory. Situational models posit that different situations require different leadership styles adjusted to the characteristics of those situations (Hersey & Blanchard, 1969, 1979). Therefore, it is assumed that there is not a single best leadership style but a variety of them which can adapt to the particular demands of a given situation.

Through the interaction of *task-* (i.e., focused on initiating, organising, directing) and *relationship-orientation* (i.e., characterised by listening, trusting, encouraging) dimensions, Reddin (1967, 1970) introduced four basic managerial styles (i.e., *integrated, dedicated, related, separated*) that represent different types of behaviour. An additional *effectiveness* dimension was further incorporated in order to assess their suitability for meeting the specific demands of a situation, and thus create a 3-D management style model (see Figure 3.17 below).

As the effectiveness of a leadership style is contingent to the situation on which it is applied, each style can potentially be more or less effective, depending on the characteristics of the situation (e.g., organisation, technology, other individuals’ behaviours), and, consequently, evolve into its corresponding equivalent type. Eventually, eight new managerial styles (not additional types of behaviour), of which evidence has actually been found in the leadership literature, can emerge from the four basic styles as a result of having been applied either appropriately or inappropriately (Hersey et al., 2013; Reddin, 1970, 1977).

Figure 3.17: Adding the third dimension. Any of the four basic styles may be more or less effective



Source: Reddin (1970), p. 13.

Reddin's framework integrates within the same model the influence of situational factors with a range of potential leadership styles resulting from such influence, and complemented with an effectiveness dimension to assess its ability for matching the situational requirements, thus providing a more comprehensive approach to understand the dynamics of leadership behaviour.

Based on Reddin's (1967) model, Hersey & Blanchard (1969, 1977, 1979) also combined two key dimensions, i.e., *supportive* (e.g., enhancing interactions and communication, providing emotional support, facilitating subordinates' tasks) and *directive behaviour* (e.g., defining roles, establishing structures and goals, organising), to produce several leadership styles (see Table 3.10) whose choice and further implementation will depend on the follower's developmental levels.

Table 3.10: The four basic leadership styles

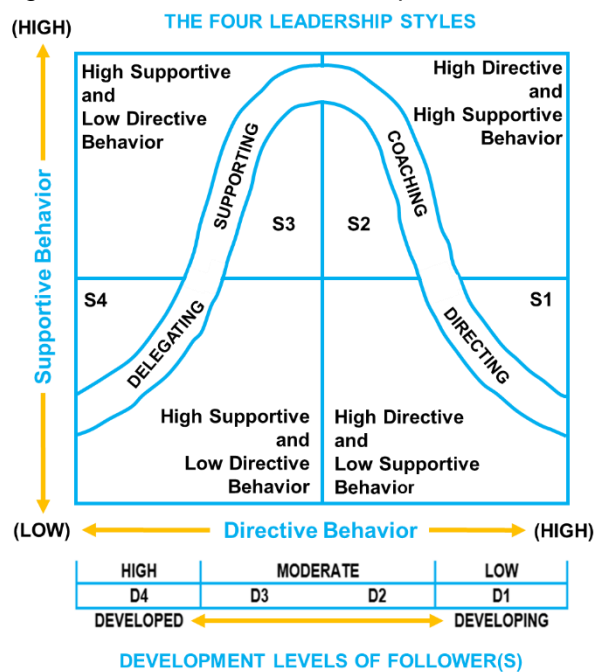
Leadership style	Behaviours
Directing	The leader provides specific direction and closely monitors task accomplishment
Coaching	The leader continues to direct and closely monitor task accomplishment, but also explains decisions, solicits suggestions, and supports progress
Supporting	The leader facilitates and supports people's efforts towards task accomplishment and shares responsibility for decision-making with them
Delegating	The leader turns over responsibility for decision-making and problem-solving to people

Source: Adapted from Blanchard, Zigarmi & Zigarmi (2011), p. 39.

Actually, followers undergo different developmental stages (i.e., low, moderate, high) which reflect their level of competence and commitment to accomplish

tasks/goals, and which ultimately determine the right style to be selected by the leader (Meirovich & Gu, 2015; Silverthorne, 2000). Thus, the model shows how leadership styles can adapt to each of the followers' development states in order to meet their changing requirements (see Figure 3.18 below) and thus ensure maximum effectiveness.

Figure 3.18: Situational Leadership II



Source: Blanchard, Zigarmi & Zigarmi (2011), p. 79.

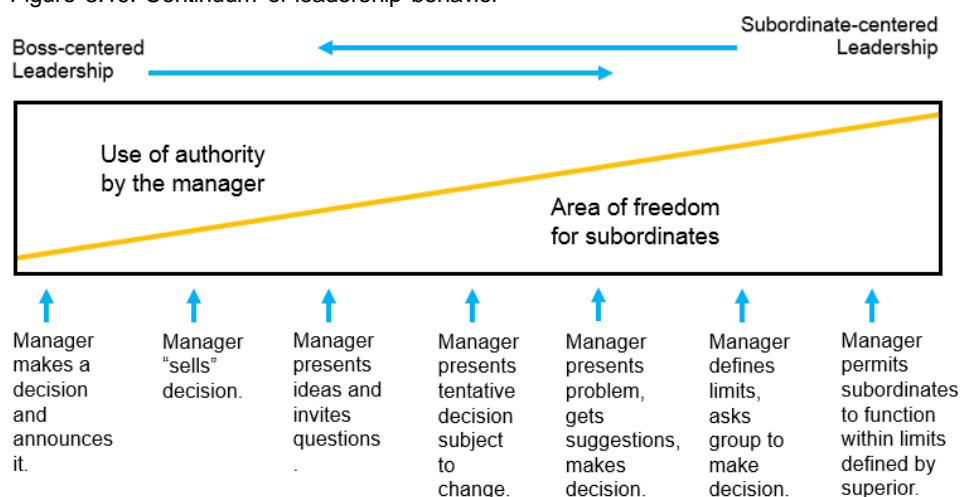
In consequence, a leader's style will first involve less supportive and more directive behaviours which will gradually become more supportive and less directive as followers' development progresses. Basically, this approach requires leaders to assess followers' level of development and adjust their leadership styles accordingly to be effective (Hersey & Blanchard, 1969, 1979; Meirovich & Gu, 2015).

Due to its easy practical approach, the Situational Leadership model has been widely applied for training and developing purposes, and even associated with productivity improvements or suitability for trauma surgeons (Avery & Ryan, 2002; Blanchard, Zigarmi, & Nelson, 1993; Sims, Faraj, & Yun, 2009). By determining the right style for each situation, the framework highlights its prescriptive stance and the leaders' flexibility in their interactions with followers (Graeff, 1983; Northouse, 2015).

Although the model implicitly indicates that there is no *best* leadership style since its effectiveness is determined by the followers' level of development, it does not explain, however, how to determine such level in order to implement the appropriate style (Ramakanth, 1988), especially when the developmental level has been neither clearly conceptualised nor operationalised to be properly measured and its predicted evolution has not been sufficiently justified and empirically supported (Avery & Ryan, 2002; Graeff, 1983, 1997; Norris & Vecchio, 1992). In addition, the lack of validity/reliability of the measurement instrument, the effects of certain variables (e.g., gender, age, education, experience), or the assumption that all subordinates share the same level of development have not been addressed (Graeff, 1983, 1997; Vecchio & Boatwright, 2002). Those shortcomings raise doubts on the model's practical utility in real life situations, especially when the lack of solid academic support for the theory made unviable to ratify its validity through research findings in any of its versions (Fernandez & Vecchio, 1997; Thompson & Vecchio, 2009; Vecchio, Bullis, & Brazil, 2006).

By showing an evident parallelism with the Ohio, Michigan, and Harvard studies' dimensions, Tannenbaum-Schmidt's (1958, 1973) model based on Lewin, Lippitt, & White's (1939) leadership styles distinguished between *subordinate-centered* (i.e., democratic) and *boss-centered* (i.e., authoritarian) leadership behaviours located at two extremes in a single continuum (see Figure 3.19 below).

Figure 3.19: Continuum of leadership behavior



Source: Tannenbaum & Schmidt (1973), p. 164.

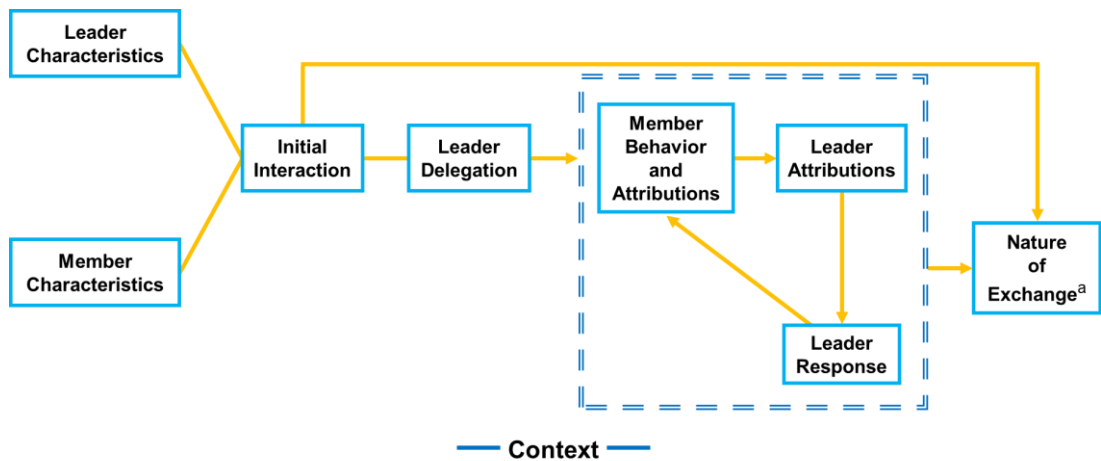
In such framework, the manager's authority and subordinates' freedom increase or decrease according to the dominant leadership behaviour (Arab, Tajvar, & Akbari, 2006; Tannenbaum-Schmidt, 2009).

Some contextual factors (i.e., leaders' value system, subordinates' degree of independence and decision-making, organisational values, group effectiveness, time pressure) can actually exert an influence on those leadership behaviours (see Hur, 2008 for an exception), what will determine the adoption of a more *subordinate-* or *boss-centered* leadership approach. The model, however, is focused on intra-group rather than inter-group decision-making or lateral communications (Hall & Leidecker, 1981), which limits its scope of action.

While the Ohio, Michigan, and Harvard studies proposed four or two leadership styles for all potential situations, Tannenbaum-Schmidt's (1958) model acknowledges that leaders can also perform a range of intermediate alternatives between both extremes that may even enhance subordinates' decision-making (Cunningham & Jackson, 2014; Hess & Bacigalupo, 2013; Hur, 2008). In doing so, leaders can adapt their leadership style to the needs of a situation and not be constrained by the limitations of a dual approach (e.g., *employee-/production-centered*), which may eventually improve their leadership effectiveness.

3.4.3.3 Leader–Member Exchange Theory. Drawing from Social Exchange Theory (Blau, 1964) and the Norm of Reciprocity (Gouldner, 1960), Leader-Member Exchange (LMX) theory builds on the Vertical Dyad Linkage (VDL) model to argue that leaders develop different quality relationships with their followers, forming multiple dyadic relationships (Dansereau et al., 1975; Graen, 1976). After an initial interaction, leaders may progressively increase their trust and support in some followers based on their attributions about followers' behaviours and performance in response to task delegation, in a process subject to contextual influences (e.g., group composition, organisational policies) (Dienesch & Liden, 1986; Erdogan & Bauer, 2014; Green & Liden, 1980); but, if an instant (positive/negative) judgement about the follower is made, leaders will circumvent the behaviour/attribution process for they have already determined the nature of the leader-member exchange (see Figure 3.20 below).

Figure 3.20: Model of the Leader-Member Exchange developmental process



^a After the nature of the exchange has been determined it is assumed that the reciprocal process between leader and member will continue.

Source: Dienesch & Liden (1986), p. 627.

As the quality of each relationship varies from dyad to dyad (Markham, Yammarino, Murry, & Palanski, 2010), this difference leads ultimately to the formation of *in-group* structures – based on high-quality relationships that go beyond the contractual agreement and characterised by mutual influence, trust, and respect – and *out-group* structures – based on low-quality relationships limited to transactional exchanges within the employment contract terms (Anand et al., 2011; Dansereau et al., 1975; Graen & Scandura 1987).

Out-group structures are characterised by lower levels of interaction, trust, and support, and can exert a differing influence on diverse outcomes (Chen, Yu, & Son, 2014; Liden, Erdogan, Wayne, & Sparrowe, 2006; Markham et al., 2010). Actually, high-quality relationships between leaders and followers generate more positive outcomes than low-quality relationships that lack those patterns of behaviour (Graen & Uhl-Bien, 1995; Uhl-Bien et al., 2012).

That process is also reinforced by individuals who, holding high- and low-quality relationships with a leader, tend to establish corresponding high- and low-quality relationships with co-workers, which equally contribute to the development of in- and out-groups, respectively (Sherony & Green, 2002; Tse, Ashkanasy, & Dasborough, 2012). However, the groups resulting from LMX differentiation can actually create conflicts caused by negative emotions and perceptions of inequality experienced by each group's members, generating further negative outcomes (e.g., low employee performance/job satisfaction, high turnover

intentions) (Bolino & Turnley, 2009; Chen et al., 2014; Vidhyarthi, Liden, Anand, Erdogan, & Ghosh, 2010), a situation that Anand et al. (2011) reflected as follows:

LMX differentiation can divide the work group into an in-group and an out-group consisting of members with high and low LMX, respectively, thereby leading to intra-group relational problems, such as mutual dislike and rejection that are detrimental to the overall group (pp. 312-313).

In this sense, some authors (Dulebohn, Bommer, Liden, Brouer, & Ferris, 2012; Henderson, Liden, Glibkowski, & Chaudhry, 2009; Uhl-Bien et al., 2012) have identified the antecedents and consequences of differentiated relationships between leader(s) and follower(s), indicating that LMX differentiation can stem from certain characteristics of leaders (e.g., leadership style), followers (e.g., competence), groups (e.g., size, composition), or organisations (e.g., culture, structure) that subsequently lead to diverse individual/group/organisational outcomes (Erdogan & Bauer, 2014). In addition, the effects of LMX differentiation can be moderated by multiple factors, such as leaders' characteristics, team or organisational climate (Haynie, Cullen, Lester, Winter, & Svyantek, 2014; Tse, 2014; Wallis, Yammarino, & Feyerherm, 2011), highlighting the impact of contextual influences on the effects of leader(s)-follower(s) relationships.

Despite its interest in followers' development and the acknowledgement of their role in leadership, LMX theory has been mainly criticised (Anand et al., 2011; Uhl-Bien et al., 2012) for:

- studying LMX relationships in isolation and neglecting organisational influences (e.g., other existing relationships/social networks; organisational culture) which can potentially have an impact on those relationships (Wang, Fang, Qureshi, & Jansse, 2015; Zagenczyk, Purvis, Shoss, Scott, & Cruz, 2015);
- the limited research explaining the development of dyadic relationships and ignoring the influence of *followers* (Dienesch & Liden, 1986; Gerstner & Day, 1997; Nahrgang, Morgeson, & Ilies, 2009); and
- having failed to adopt a multi-level approach – and producing often a misalignment of levels when adopted – by focusing mostly on dyadic rather than on group or organisational levels of analysis (Gooty et al., 2016; Gooty

& Yammarino, 2016), which would provide a more comprehensive account of LMX relationships.

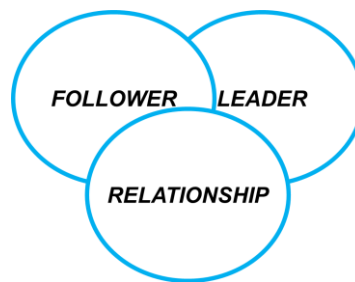
In addition, research instruments for measuring LMX relationships have proven to be valid and reliable for assessing perceptions of relationships quality, but not suitable for capturing the exchange of resources (e.g., information) and support (e.g., training) between leader(s) and follower(s) in a LMX relationship (Graen & Uhl-Bien, 1995; Liden & Maslyn, 1998; Schriesheim et al., 1992). Likewise, empirical studies have been mostly cross-sectional rather than longitudinal, when the latter would be more appropriate to gain a better understanding of the LMX relationships development across time (Anand et al., 2011; Erdoyan & Bauer, 2014; Uhl-Bien et al., 2012).

Finally, the issue of dimensionality remains unsolved and, although most researchers conceive LMX relationships as a multi-dimensional rather than as a one-dimension construct (Dienesch & Liden, 1986; Graen & Uhl-Bien, 1995; Liden & Maslyn, 1998; Schriesheim, Neider, Scandura, & Tepper, 1992), this divergence leads to the application of different operationalisations and research instruments for assessing the quality of leader-follower(s) relationships that are likely to yield inconsistent results (Erdoyan & Bauer, 2014; Gerstner & Day, 1997; Schriesheim, Castro, & Cogliser, 1999; Uhl-Bien et al., 2012).

In conclusion, LMX theory highlights the importance of leader(s)-follower(s) relationships at the workplace, and differs from previous perspectives in that:

- it favours heterogeneous rather than homogeneous leadership styles with subordinates; and
- it does not conceive followers as passive recipients but assigns them an active role by acknowledging their relationship with the leader (see Figure 3.21 below) within the context of a social exchange that culminates in reciprocally influential leader-follower relationships (Anand et al., 2011), thus reflecting “a more balanced understanding of the leadership process” (Graen & Uhl-Bien, 1995, p. 221).

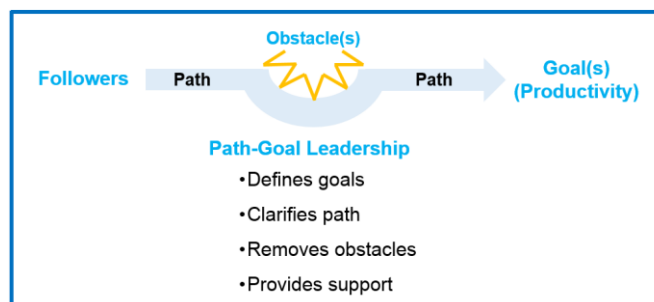
Figure 3.21: The domains of leadership



Source: Graen & Uhl-Bien (1995), p. 221.

3.4.3.4 Path-Goal Theory. Drawing from the Expectancy Theory (Vroom, 1964), the Ohio studies dimensions (Fleishman, 1951, 1953), and Georgopoulo, Mahoney, & Jones' (1954) and Evan's (1970) studies, Path-Goal Theory states that leaders can affect subordinates' motivation by facilitating their path towards goal attainment (e.g., by reducing role ambiguity, providing rewards and support, removing obstacles) and thus satisfy their needs and preferences (e.g., need for affiliation, internal locus of control, preferences for structure, self-perceived level of ability), which overall increases their satisfaction and, consequently, leads to effective performance (see Figure 3.22 below) (House, 1971, 1996; House & Mitchell, 1974).

Figure 3.22: The basic idea behind Path-Goal Theory

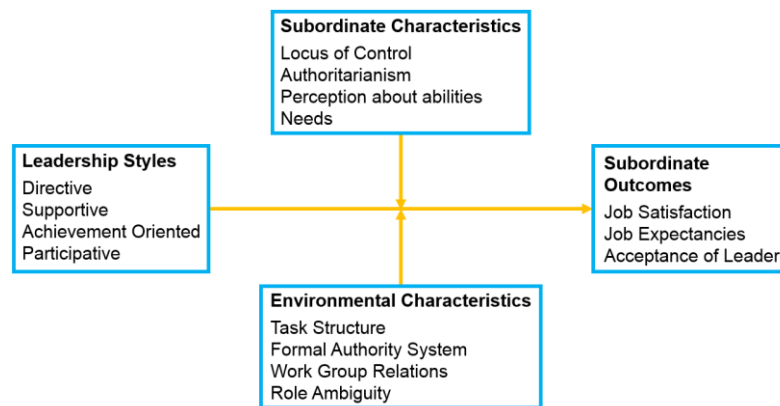


Source: Northouse (2015), p. 116.

Similar to LMX Theory, Path-Goal Theory was primarily conceived as “a dyadic theory of supervision” (House, 1996, p. 325) between superiors and subordinates; but House's theory, in contrast, was further reformulated into a work-unit level of analysis (e.g., Dixon & Hart, 2010) with adapted leadership behaviours (e.g., interaction facilitation, group-oriented decision process) (House, 1996). Like other contingency theories, it combines leaders' *relationship-* (i.e., consideration) and *task-oriented* behaviours (i.e., initiating structure) that

result in several leadership styles (i.e., directive, supportive, participative, and achievement-oriented). Their success depends on the extent to which they can be complemented with followers' abilities and the working environment in order to compensate their potential deficiencies and thus better meet their needs (Awan & Zaidi, 2009; Evans, 1970, 1974; Vandegrift & Matusitz, 2011). In addition, situational variables (e.g., subordinates' characteristics, environmental characteristics) can affect the extent to which leaders' behaviours may influence subordinates' motivation (see Figure 3.23 below) (House & Dessler, 1974, cited in Green, 1979; Stinson & Johnson, 1975).

Figure 3.23: Main constructs of Path-Goal Theory of Leadership



Source: House & Mitchell (1974), p. 33.

Among others assumptions, Path-Goal theory hypothesised that highly structured tasks enact leaders' supportive style since roles, guidelines, and goals were clearly defined and thus additional structure was not necessary; conversely, low structured tasks required directive leadership to provide role clarity and performance standards in order to successfully complete the tasks and thus enhance employee motivation and further satisfaction (House, 1971, 1996; House & Dessler, 1974, cited in Stinson & Johnson, 1975).

Research on Path-Goal tenets have yielded mixed results to support the theory (Dessler & Valenzi, 1977; Downey et al., 1975; Fulk & Wendler, 1982; Greene, 1979; Sagie & Koslowsky, 1994; Schriesheim, Castro, Zhou, & DeChurch, 2006; Szilagyi & Sims, 1974; Vandegrift & Matusitz, 2011), mostly because:

- some intervening variables – such as rewards, work values, or need for affiliation – on which leaders exert an influence and which also affect followers' motivation have not been sufficiently assessed (Evans, 1996;

Galbraith, 1970; Knoop, 1982; Mathieu, 1990), and most research have focused on task characteristics (e.g., Awan, Zaidi, Naz, & Noureen, 2011; Keller, 1989; Schriesheim & Schriesheim, 1980), building an incomplete picture of the relationships between the influential sources, moderating factors, and outcomes in the leadership process; and

- the theory has not been adequately tested due to the diverse operationalisations of leadership behaviours (i.e., *consideration, initiating structure*), which have resulted in the application of inappropriate measurement instruments (Dessler & Valenzi, 1977; House, 1996; Schriesheim & Von Glinow, 1977; Stinson & Johnson, 1975; Wofford & Liska, 1993), whose subscales included items pertaining to other leadership behaviours (i.e., arbitrary, punitive, autocratic, production-oriented) unrelated to the theory (Hammer & Dachler, 1975; House & Dessler, 1974, cited in Schriesheim & Von Glinow, 1977).

Alternatively, the proposals for extensions and refinements suggests the possibility of a deficient theory, which would also explain the inconsistent results (Evans, 1974; Schriesheim & Von Glinow, 1977; Stinson & Johnson, 1975; Weisenfeld & Killough, 1992).

Despite initial optimistic predictions (Jermier, 1996), theoretical development and empirical research on Path-Goal Theory fell into an “arrested state” (Schriesheim & Neider, 1996, p. 320) and, although some studies have been published lately (e.g., Alanazi et al., 2013; Famakin & Abisuga, 2016), research on this theory is currently scarce.

In summary, Contingency theories display a wide variety of leadership styles (see Table 3.11 below) which equally reflect a range of options between task-oriented and employee-oriented behaviours, thus sharing the same dichotomy with behavioural leadership theories but incorporating the influence of situational variables.

Table 3.11: Summary of Contingency theories

Theories	Leadership styles	Level of analysis
Contingency Theory		
Fiedler (1964, 1978)	Relationship- and task-motivated	Dyadic, Group
Situational Leadership Theories		
3D Leadership Theory (Reddin, 1967, 1970)	Related, integrated, separated, dedicated	Group
Situational Leadership Theory (Hersey & Blanchard, 1969, 1977)	Directing, coaching, supporting, delegating	Group
Leadership Continuum Theory (Tannenbaum & Schmidt, 1958, 1973)	Subordinate-centered (i.e., democratic) and boss-centered (i.e., authoritarian)	Group
Leader-Member Exchange Theory		
Dansereau, Graen & Haga (1975)	High- and low-quality dyadic relationships	Dyadic
Path-Goal Theory		
House (1971, 1996); House & Mitchell (1974)	Directive, supportive, participative, achievement-oriented	Dyadic, Work-unit

Note: Adapted from Dansereau, Graen & Haga (1975); Dienesch & Liden (1986); Fiedler (1964, 1967, 1978); Hersey & Blanchard (1969, 1977); House (1971, 1996); House & Mitchell (1974); Reddin (1967, 1970); Tannenbaum & Schmidt (1958, 1973).

3.4.3.5 Summary. Contingency theories attracted academic interest for their comprehensive approach to leadership, taking into account the characteristics of leaders, followers, and the situation to explain the leadership process. However, most empirical research have yielded conflicting evidence, highlighting the lack of enough support for those theories.

In this sense, the numerous combinations of multiple variables that could be potentially interacting in the leadership process seemed too broad to be properly investigated and captured by a single model, revealing an extensive gap in empirical research which does not contribute to theoretical validity. That disenchant would be fulfilled, in the early 1980s, with the advent of the *New Leadership* theories which would revolutionise the field with their new approach and focus of research.

3.4.4 ‘New Leadership’ theories: Transformational Leadership. ‘New Leadership’ theories or neocharismatic paradigm – which encompass Transformational, Charismatic, and Visionary Leadership (Bass, 1985; Burns, 1978; Conger & Kanungo, 1987; House, 1977; McClelland, 1975; Sashkin, 1987)

– dominated leadership research since the early 1980s (Bryman, 1992; House & Aditya, 1997).

Following a leader-centred approach, 'New Leadership' theories are characterised by the articulation of a motivating vision and the values inherent to that vision with which followers strongly identify, strive for, and feel committed to (Bass, 1985; Burns, 1978; Tichy & Devanna, 1986). This depicts leaders as *managers of meaning* for interpreting the complexity and ambiguity of situations, and for attaching them a meaning that provides *followers* a sense of direction and purpose (Alvesson & Spicer, 2014; Smircich & Morgan, 1982).

In addition to *New Leadership* theories, Authentic and Servant Leadership received increasing academic attention since 2000s (Avolio et al., 2004; Barbuto & Wheeler, 2006; Beck, 2014; Gardner et al., 2005; Greenleaf, 1970; Luthans & Avolio, 2003; Ilies et al., 2005; Shamir & Eilam, 2005), but have not been discussed in this section due to the lack of evidence provided by the data collected in the present study.

Originally coined by Downton (1973) but further developed by Burns (1978), Transformational Leadership (TFL), the most studied leadership theory in the last twenty years, is defined as “leader behaviors that transform and inspire followers to perform beyond expectations while transcending self-interest for the good of the organization” (Avolio et al., 2009, p. 423).

TFL involves a relationship of strong emotional attachment with followers and a collective commitment to a higher moral cause that eventually turns followers into leaders and leaders into “moral agents” because of their positive attitude towards followers’ needs and requirements (Burns, 1978, p. 4; Díaz-Sáenz, 2011).

3.4.4.1 Approach. The driving force of TFL lies on the followers’ higher motivations and highly ethical aspirations, needs, values, and goals triggered by leaders, who are fundamentally oriented to achieve exceptional performance and accomplish social change by transcending self-interest (Bass, 1985; Bass & Avolio, 1990; Burns, 1978). Transactional Leadership (TSL), in contrast, conceives leader-follower relationships as a reciprocal exchange derived from a contractual transaction (i.e., support and rewards for efforts and performance) (Antonakis, 2012; Walumbwa & Wernsing, 2013). That distinction (see Table 3.12

below) has been interpreted as an analogy between leadership and management (Conger, 1999; Kotter, 1990; Sashkin, 2004; Zaleznik, 1992).

Table 3.12: Characteristics of transactional and transformational leaders

Transformational Leader
<i>Charisma</i> : Provides mission and sense of vision, instils pride, gains respect and trust.
<i>Inspiration</i> : Communicates high expectations, uses symbols to focus efforts, expresses important purposes in simple ways.
<i>Intellectual Stimulation</i> : Promotes intelligence, rationality, and careful problem solving.
<i>Individualized Consideration</i> : Gives personal attention, treats each employee individually, coaches, advises.
Transactional Leader
<i>Contingent Reward</i> : Contracts exchange of rewards for effort, promises rewards for good performance, recognizes accomplishments.
<i>Management by Exception (active)</i> : Watches and searches for deviations from rules and standards, takes corrective action.
<i>Management by Exception (passive)</i> : Intervenes only if standards are not met.
<i>Laissez-Faire</i> : Abdicates responsibilities, avoids making decisions.

Source: Bass (1990a), p. 22.

Unlike Burns (1978), Bass (1985) considered both behaviours as two separate dimensions rather than as two opposite ends of a continuum, meaning that a leader could implement both styles simultaneously, and added a third dimension: *laissez-faire* (i.e., avoidance or absence of leadership).

While transactional leaders rely on *power over* (i.e., the power held by one person to control another), developing followers' resistance and attempts to circumvent it, transformational leaders implement *power to influence* others based on reliance on followers, who develop a personal identification with the leader, which, in contrast, promotes acceptance (Collinson, 2011; Kark & Shamir, 2013; Lovaglia et al., 2012). In order to reach that stage, leaders' behaviours (see Table 3.13 below) should aim at identifying followers' motivations and expand/alter their needs (e.g., self-actualisation) to further raise their self-awareness by realising their own potential to meet those needs (Burns, 1978; Maslow, 1954). In turn, individuals get encouraged and, driven by the same purpose(s), become fully engaged in the process, acting beyond their own self-interest in benefit of the group in order to reach common goals.

Table 3.13: Behavioral indicators of transformational leadership^a

Individualized consideration	
Recognizes individual strengths and weaknesses	Enlarges individual discretion commensurate with ability and needs
Shows interest in the well-being of others	Encourages a two-way exchange of view
Assigns projects based on individual ability and needs	Promotes self-development
Inspirational motivation	
Convinces followers that they have the ability to achieve levels of performance beyond what they felt was possible	Raises expectations by clarifying the challenges
Sets an example for others to strive for	Thinks ahead to take advantage of unforeseen opportunities
Presents an optimistic and attainable view of the future	Provides meaning for actions
Intellectual stimulation	
Encourages followers to re-examine their assumptions	Creates a “ <i>readiness</i> ” for changes in thinking
Takes past examples and applies to current problems	Creates a “ <i>holistic</i> ” picture that incorporates different views of a problem
Encourages followers to revisit problems	Puts forth or listens to seemingly foolish ideas
Idealized influence	
Transmits a sense of joint mission and ownership	Addresses crises “ <i>head on</i> ”
Expresses dedication to followers	Eases group tension in critical times
Appeals to the hopes and desires of followers	Sacrifices self-gain for the gain of others

^aCollected by interviews with managers in a large European multinational firm.

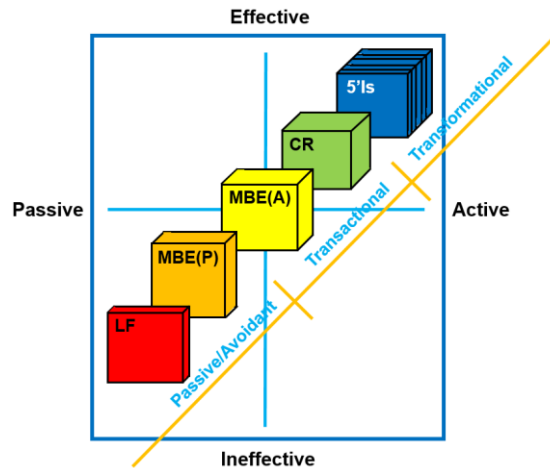
Source: Bass & Avolio (1993), p. 56.

In doing so, transformational leaders do not only increase individual and organisational performance; but aim at transforming the existing order of things by addressing their followers’ needs for personal development in a process of mutual influence that leads to individual and organisational identification and higher levels of motivation (Carter, Armenakis, Feild & Mossholder, 2013; Conger, 1999; García-Morales, Lloréns-Montes, & Verdú-Jove, 2008; Kark & Shamir, 2013; Paarlberg & Lavigna, 2010).

It should be noted that the leaders’ behaviours attached to that process differ from those of pseudo-transformational leadership which, in contrast, are characterised by leaders’ self-interests and unethical values and behaviours (e.g., manipulative, deceptive), thus yielding, consequently, different outcomes (e.g., fear of the leader) (Barling, Christie, & Turner, 2008; Bass & Steidlmeier, 1999; Christie, Barling, & Turner, 2011; Dasborough & Ashkanasy, 2002; Price, 2003).

3.4.4.2 The Full-Range Model of Leadership. TFL is integrated into the Full-Range Leadership Model (see Figure 3.24 below), comprised of three leadership behaviours that encompass nine factors altogether (Antonakis & House, 2013; Avolio, 2011; Bass & Avolio, 1990, 1997).

Figure 3.24: Full Range Leadership Model



Legend: LF=Laissez-Faire; MBE(P)= Management-By-Exception (Passive); MBE(A)=Management-By-Exception (Active); CR=Contingent Reward; 5I's= Idealised Influence (Attributed), Idealised Influence (Behaviours), Inspirational Motivation, Intellectual Stimulation, Individualised Consideration.

Source: Bass & Avolio (1995), p. 6.

According to Bass (1985), TFL is more effective than TSL and most likely to appear at higher hierarchical levels in organic organisations (i.e., characterised by high trust on subordinates, emphasis on creativity, network structure of control and authority, appropriate for changing conditions) (e.g., Dust, Resick, & Mawritz, 2014; Edwards & Gill, 2015; Erkutlu, 2008; Sarver & Miller, 2014) rather than in mechanistic organisations (i.e., characterised by clear goals and structure, hierarchical structure of control and authority, relatively slow to adapt to unexpected situations, and suitable for stable environments) where TSL would be mostly applied (Burns & Stalker, 1961; Bass, 1985). Some studies, however, have found that TSL can be more effective in extreme circumstances than TFL, which can also appear at lower hierarchical levels and in mechanistic organisations (Carter et al., 2013; Edwards & Gill, 2015; Geier, 2016; Lowe, Kroeck, & Sivasubramaniam, 1996; Singer & Singer, 1990), contradicting Bass' (1985) claims. On the other hand, passive/avoidant behaviours are the most inactive and negative forms of leadership (e.g., *laissez-faire*) and tend to produce

undesirable results (e.g., lower follower motivation); consequently, leaders applying them are perceived as ineffective (Bogler, Caspi, & Roccas, 2013; Dum Dum, Lowe, & Avolio, 2013; Mathieu & Babiak, 2015).

Additionally, TFL will produce an *augmentation effect* over the effect of TSL (Bass & Avolio, 1990, 2003; den Hartog, Shippers, & Koopman, 2002; Rowold & Heinitz, 2007; Schriesheim et al., 2006); but it has also been found the reverse effect, an expansion of only TFL, or no effect at all (Bass, Avolio, Jung, & Berson, 2003; Edwards & Gill, 2012; Judge & Piccolo, 2004; Vecchio, Justin, & Pearce, 2008). Nevertheless, the augmentation effect implies that TFL does not replace but builds on TSL and both complement each other (Bass, 1985; Bass & Avolio, 1993), suggesting that effective leadership practice requires both behaviours to achieve the most optimal profile of leadership (i.e., *contingent reward, idealised influence, inspirational motivation, intellectual stimulation, individualised consideration*) (Analoui et al., 2012; Birasnav, 2014; Nguni, Slegers, & Denessen, 2006). However, once again, that proposition has also been challenged (Fernandes & Awamleh, 2011).

3.4.4.3 Integrated approach. Irrespective of whether Transformational, Charismatic, and Visionary Leadership are considered similar, identical, or differentiated theories; or whether charisma or developing a vision are regarded as components of TFL (Barbuto, 1997; Bass, 1990a; Conger, 2014; Sashkin, 2004; Tichy & Devanna, 1986), for the purposes of this research Charismatic and Visionary Leadership will be examined conjointly with TFL as a single theory, provided that:

- there is a significant overlap between those theories in terms of approach (i.e., evolving process involving an influence based on leaders' qualities and values) (Avolio & Yammarino, 2013; Mhatre & Riggio, 2014; van Knippenberg & Stam, 2014), the leadership behaviours, and the dimensions that define their respective constructs (House & Shamir, 1993; Antonakis & House, 2013);
- they share an emphasis "on exceptional leaders who have extraordinary effects on their followers and eventually on social systems" (Shamir et al., 1993, p. 577), transforming followers' individual needs, aspirations,

preferences, and values into collective interests, which essentially makes reference to the same concept (House & Shamir, 1993; van Knippenber & Sitkin, 2013); and

- it has been explicitly acknowledged the convergence between the theories based on a mutual influence, which actually reflects an integration process (Conger, 1999; Sashkin, 2004; Shamir, House, & Arthur, 1993).

In addition, TFL has been strongly linked to Leader-Member Exchange (LMX) Theory since both are rooted in a social exchange process between leaders and followers (Anand et al., 2011; Dienesch & Liden, 1986). LMX can actually comprise TSL behaviours when they are based on rewards, feedback, and recognition for accomplishments (i.e., lower quality LMX relationships), but also TFL behaviours when they involve mutual trust, respect, and support (i.e., higher quality LMX relationships) (Dulebohn et al., 2012; Graen & Uhl-Bien, 1995; Howell & Hall-Merenda, 1999). Furthermore, TFL dimensions (e.g., *individualised consideration*) have been found to be closely linked to LMX dimensions (Basu & Green, 1997; Shunlong & Weiming, 2012), so employees with high-quality LMX may be more willing to be influenced by transformational leaders (Piccolo & Colquitt, 2006), which suggests that LMX could also be conceived as a pre-condition or “underlying mechanism” (Tse et al., 2010, p. 24) for the enactment of TFL or that both styles support each other (Wang et al., 2005). Nevertheless, it has also been argued that TFL and LMX behaviours are different both in theory – because of the conceptual meaning of their dimensions – and in practice – because of their multi-level outcomes (individual for LMX and collective for transformational) – which suggests that their integration is still unclear and requires additional research (Anand et al., 2011; Dulebohn et al., 2012).

3.4.4.4 Summary. In the same vein as the early Trait approach, ‘new’ leadership theories emphasised key individual leadership characteristics and the leaders’ capacity to motivate and mobilise their followers. However, the strong criticisms and dissatisfaction generated by this approach, particularly in reference to the excessive capabilities and concentration of influence attributed to a single person that seemingly explained any organisational outcome, caused a shift towards alternative perspectives that better reflected the leadership patterns

implemented in organisations, and whose approach will be discussed in the next section.

3.4.5 Emerging perspectives: Distributed Leadership. The lack of a grounded approach of the *New leadership* theories to explain leadership practice led to an increasing interest in emerging perspectives in the early 2000s, such as Complexity, Relational, or Shared Leadership (Drath, 2001; Marion, 1999; Pearce & Conger, 2003b) – also known as *post-transformational* or *post-charismatic* leadership theories (Gronn, 2002b) – characterised by a collective and a socially-constructed perspective of leadership.

The significance of the emerging perspectives lies mainly on their new and uncharted approach to leadership, which implies a clear and substantial break both in theoretical and practical terms with key features of past mainstream conceptions of leadership (see Table 3.14 below) that have been predominant in the field since the beginnings of the scientific study of the phenomenon (Gronn, 2002a; Harris, 2014).

Table 3.14: An emerging view of leadership

The Traditional View of Leadership	An Emerging View
Leadership resides in individuals	Leadership is a property of social systems
Leadership is hierarchically based and linked to the office	Leadership can occur anywhere
Leadership occurs when leaders do things to followers	Leadership is a complex process of mutual influence
Leadership is different from and more important than management	The leadership/management distinction is unhelpful
Leaders are different	Anyone can be a leader
Leaders make a crucial difference to organizational performance	Leadership is one of many factors that may influence organizational performance
Effective leadership is generalizable	The context of leadership is crucial

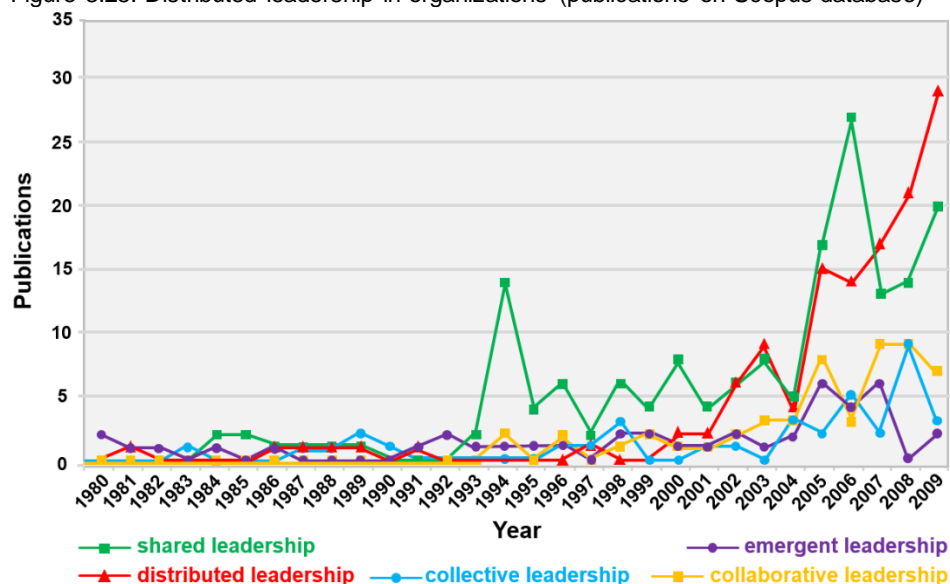
Source: Simkins (2005), p 12.

Among those perspectives, Distributed Leadership stands out not only for the academic interest and subsequent body of research generated since its emergence, but also for its wide implementation in the educational sector as an alternative to the unsuccessful application of TFL (Bennett, Wise, Woods, & Harvey, 2003; Bolden, 2011; Harris, 2008, 2009; Leithwood, Mascall, & Strauss, 2009a; Parker, 2015; Tian, Risku, & Collin, 2015).

Distributed Leadership (DL) has been defined as the “emergent property of a group or a network of interacting individuals in which group members pool their expertise” (Gronn, 2000, p.3), which implies that organisations may not only source skills and expertise from a wider number of its members to benefit from their individual capabilities, but also reduce the workload for those in formal leadership positions and minimise errors and risks arising from decisions based on the limited information available to a single leader (Harris, 2008; Leithwood, Mascall, & Strauss, 2009c).

Although the concept was introduced in the mid-1950s (Gibb, 1954), the development of the distributed perspective took place in the 2000s (see Figure 3.25 below) when it became “the leadership idea of the moment” (Harris, 2012, p. 7).

Figure 3.25: Distributed leadership in organizations (publications on Scopus database)



Source: Bolden (2011), p. 255.

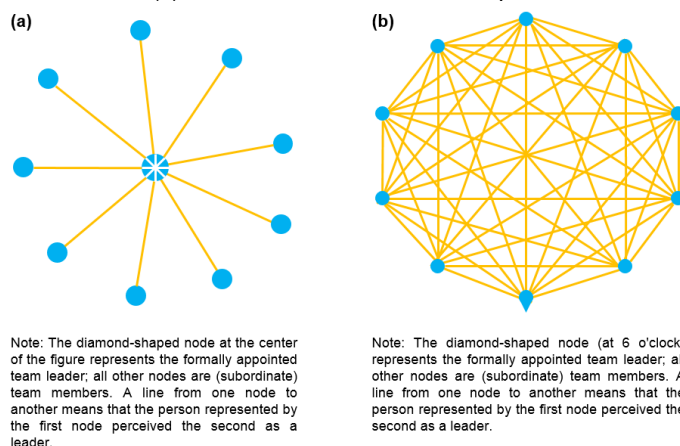
3.4.5.1 Key characteristics. The emergence of DL has been regarded among scholars and practitioners as “an idea whose time has come” (Gronn, 2000, p. 333), for conceiving leadership as a socially-constructed process and a collective practice.

On the one hand, leadership emerges from the interactions and relationships of multiple individuals within the context of their working relationships rather than being formally allocated to a single person; as opposed to traditional leadership approaches (e.g., trait, behavioural, contingency) and leader-centred theories

(e.g., ‘Great Man’, TFL) that emphasise individuals’ traits or behaviours (Crevani et al., 2010; Hosking, 2006; Spillane, 2006; Torrance, 2013a). In consequence, the leadership role is not attached to a person, but can be held by several individuals on different occasions depending on the characteristics of the situation (e.g., organisational culture, type of task, information available). Thus, leadership acquires a dynamic nature and context-based approach since the leadership practice is “stretched over” (Spillane, Halverson, & Diamond, 2001, p. 23) the social and situational context where it takes place. Furthermore, the leader-follower dualism prevalent in leadership studies is not suitable anymore to define the leadership practice in organisations since it rests on imbalanced and dependent relationships that do no longer apply (Gronn, 2000; 2002b).

On the other hand, DL has been perceived as “a kind of post-heroic alternative” (Gronn, 2009a, p. 383) to individual leadership as it involves thinking of leadership as a collective rather than as an individual practice. As it is assumed that individuals possess a unique set of skills and expertise, the leadership role can potentially be enacted by anyone, regardless of their position, role, or status within an organisation (Leithwood et al., 2009c; Spillane et al., 2004; Timperley, 2005), as shown in Figure 3.26 below.

Figure 3.26: (a) The traditional leader-centred team leadership structure and (b) the distributed team leadership structure



Source: Mehra, Smith, Dixon & Robertson (2006), p. 234.

Accordingly, one individual cannot represent the unit of analysis to study leadership, which has become distributed as it is exercised by many rather than only one person. This shift has been favoured by changes in the division of labour, which have promoted task integration and specialisation, leading in turn

to the emergence of new forms of interdependence and coordination that have generated distributed patterns of leadership in organisations.

Likewise, the new unit of analysis challenges the individualism and leader-centrism characteristic of mainstream leadership theories that conceive leadership as the property of a single individual (Gronn, 2002a, 2002b).

Table 3.15 below summarises the key characteristics of DL, their meanings as well as some of their theoretical and practical implications.

Table 3.15: Distributed Leadership: key characteristics, meanings, and implications

Key characteristics	Meanings	Implications
Socially-constructed process	<ul style="list-style-type: none"> Leadership is no longer based on individual traits, skills, behaviours, role or status; but arises naturally from the interactions and relationships among individuals 	<ul style="list-style-type: none"> Rejection of leader-follower dualism Research focuses on social interactions, relationships, and regular practices at the workplace
	<ul style="list-style-type: none"> The leader role is not fixed but it frequently shifts across different individuals depending on the particularities of the situation 	<ul style="list-style-type: none"> Dynamic nature and context-based approach of leadership
Collective phenomenon	<ul style="list-style-type: none"> Leadership is no longer perceived as an individual phenomenon 	<ul style="list-style-type: none"> Revision of the unit of analysis: from individual to distributed leadership Critique and challenge to mainstream leadership theories based on individualism and leader-centrism
	<ul style="list-style-type: none"> Expertise resides in all members, so anybody can potentially assume the leading role 	<ul style="list-style-type: none"> Research involves multiple sources of leadership both in formal and informal positions

Note: Adapted from Bennett, Wise, Woods & Harvey (2003); Gronn (2000, 2002a, 2002b); Spillane (2006); Spillane, Halverson & Diamond (2001, 2004).

3.4.5.2 Properties. The literature has highlighted some key properties of DL:

- autonomy (Bennett et al., 2003; Day et al., 2010), which provides the capacity to make decisions “that will lead to action and change” (Scribner, Sawyer, Watson, & Myers., 2007, p. 83);
- expertise*, which determines the exercise of leadership practice based on individual skills and specialised knowledge (Copland, 2003; Duif, Harrison, & van Dartel, 2013);
- teamwork*, which involves collaboration among organisational members (Bienefeld & Gudela, 2011; Jones, Harvey, Lefoe, & Ryland, 2014); and

- *interdependence* and *coordination*, manifested through reciprocal influence and overlapped or complementary responsibilities, respectively (Gronn, 2002a, 2002b; Spillane et al., 2004).

Those properties (see Appendix B, p. 240 for a further review) have been supported by theoretical studies and empirical research (Buchanan, Addicott, Fitzgerald, Ferlie, & Baez, 2007; Day et al., 2009; Leithwood et al., 2007; Seong & Ho, 2012; Tian et al., 2015; Torrance, 2013a); therefore, their presence should determine the extent to which DL is implemented in a particular environment.

3.4.5.3 Hybrid Leadership. The notion of DL initially outlined by Gronn (2000, 2002b) has evolved from an exclusive distributed perspective into a new notion of leadership that describes more accurately the leadership practice within organisations. This development entails that the practical implementation of DL does not necessarily mean the rejection of formal hierarchical structures or traditional solo leadership approaches (e.g., McKee, Charles, Dixon-Woods, Willars, & Martin, 2015; Spillane et al., 2007; Torrance, 2013b). Organisations that manage effectively the dynamics of working relationships merge “strong ‘personalized’ leadership at the top with ‘distributed’ leadership” (Graetz, 2000, p. 556). Forms of DL (e.g., ad hoc groups) can work in conjunction with the formal accountability structure of an organisation (Woods, Bennet, Harvey, & Wise, 2004). Those claims imply that the DL perspective can actually coexist with individual leadership styles embedded in an organisation’s hierarchical structure since both are not mutually exclusive and could be effectively combined in the same workplace (Crawford, 2012; Gronn, 2008; Spillane, 2006), providing an organisation with a more responsive, flexible, cohesive, and dynamic approach to leadership (e.g., Gronn, 2009a; Grubb & Flessa, 2006; Townsend, 2015).

That perspective opens up the possibility that leadership, rather than being conceived as two opposite forms (i.e., focused, distributed) on a continuum (Gibb, 1954), may be better understood as a hybrid concept that integrates varying degrees of both concentrated and distributed forms of leadership in a mixed leadership pattern (see Figures 3.27 and 3.28 below).

Figure 3.27: The focused-distributed leadership continuum



Figure 3.28: The hybrid leadership continuum



Note: Adapted from Gronn (2008, 2009b, 2011).

The enactment of Hybrid Leadership (HL) would be triggered by the need to provide an “adaptive or emergent response to wider environmental and immediate situational challenges” (Gronn, 2009a, p. 20), enabling organisations to adapt to the diverse demands, conditions, and constraints of their internal and/or external environment (e.g., Collinson & Collinson, 2009; Day et al., 2009). In fact, the need for formally assigned leaders providing a clear vision and direction, and monitoring organisational progress is still acknowledged within a DL framework, which suggests that both approaches can complement and reinforce each other to successfully implement leadership practice (Bolden et al., 2008b, 2009; Firestone & Martínez, 2009; Seong & Ho, 2011).

Most evidence of HL has been found in the educational sector (Bolden et al., 2009; Bush et al., 2012; Hulpia et al., 2012; Leithwood et al., 2009c; van Ameijde et al., 2009; Youngs, 2013), including Higher Education where effective leadership is characterised by a “blended” (Collinson & Collinson, 2009, p. 369) or “hybrid” mix of approaches (Bolden et al., 2008a, p. 2). However, there are still disproportionately high levels of influence exerted by individual formal leaders, particularly with regard to budget-related decisions and the control of (financial) resources, which shows that the effective implementation of HL can actually be constrained by or even lead to competing conceptions of leadership reflected in the tension between individual and collective practice (Bolden et al., 2008b; Gosling et al., 2009).

Therefore, and in order to avoid confusion, the use of the term DL will be more appropriate for manifestations of *conjoint agency* (Gronn, 2002b), whereas the term HL will be applied to the resulting combination of individual leadership (i.e., concentrated in one formal leader) and DL (e.g., dyads, triumvirates, teams, partnerships, networks) (e.g., Grubb & Flessa, 2006; McKee et al., 2015; Townsend, 2015).

3.4.5.4 Summary. Emerging perspectives highlight the need for a more collective, dynamic, inclusive, context-dependent, and relationship-based understanding of leadership, in contrast to mainstream leadership conceptions relying on individual attributes and hierarchical positions within organisations. Beyond their capacity to be flexible, adaptive, and responsive to changes, their relevance does not only reside on their dynamic nature on conceiving leadership as a collective and socially-constructed process based on relationships and interactions, or on their ability to expose the limitations of conventional and individualistic leadership approaches and their overemphasis on human agency; but, most importantly, on their approach, which provoked a change whereby the focus of study is no longer on leaders but on leadership practice. Thus, emerging perspectives, in general, and DL, in particular, can be regarded as relatively unexplored concepts holding both academic and practical potential.

3.4.6 Conclusions. Leadership is a rich but also a complex concept yet to be decoded. Although the notion of leadership has been closely bound to human origins and evolution, the scientific study of leadership has generated more doubts than certainties. The numerous definitions of the concept and theories of leadership come to certify the elusive nature of a phenomenon that has not yet been accurately described. That shortcoming equally applies to the concept of leader. While the regular appearance of new theories and approaches has usually revitalised the notion of the concept and provided new foci of analysis that enhanced empirical research, it may have also contributed to increase the overall confusion, suggesting that a definitive and universal understanding of leadership and/or leader may be far from being achieved. The fact that academics and practitioners have not given up in their determination to better understand this phenomenon does nothing but suggest that the search for the nature and meaning of leadership will continue inextricably to be “one of the world’s oldest preoccupations” (Bass, 1990a, p. 3).

3.4.6.1 Research questions. The literature review has provided an overview of the notion of leadership, including discussions on related concepts, the qualities of the leader figure, and the key theories that have emerged from

theoretical and empirical research. However, the examination of the leadership field has also raised several questions that may require further exploration:

1. What is leadership in a contact centre context?
 - 1.1. How is it conceived: as something innate to individuals (i.e., a trait) or as something that can be developed (i.e., a process); as something that arises naturally (i.e., emergent phenomenon) or as something that is allocated (i.e., role, position)?
 - 1.2. How is it perceived and/or experienced (e.g., based on authority, coercion, control, persuasion, or power; other perceptions)?
2. What is a leader in a contact centre context?
 - 2.1. What is it required to be, become, or act as one?
 - 2.2. Are leaders and managers the same or they are different roles? Why?
3. What leadership practice(s) is/are implemented in current contact centres:
 - is it an individual-oriented practice (i.e., based on 'traditional' leadership theories);
 - is it a collective-oriented practice (i.e., based on 'emerging' leadership theories);
 - or both? If both, with which purpose are they implemented?
4. Would qualitative research provide greater and deeper insights into the leadership phenomenon, considering the dominance of quantitative studies?

Table 3.16 below shows the links between the themes discussed in the Literature Review and the research questions posed above. In order to address those research questions, an appropriate methodology and research design need to be formulated, which will be explained in the following chapter.

Table 3.16: Key themes, literatures, and research questions (the key authors relevant to the present research are in **bold**)

Key Themes		Research Questions
3.2 Leadership		1. What is leadership in a contact centre context?
3.2.1 Definitions and conceptualisations (i.e., trait vs. process; assigned vs. emergent).	Burns, 1978; Fiedler, 1967; Hemphill, 1949; Northouse, 2015 ; Rost, 1991; Stogdill, 1950; Tannenbaum et al., 1961; Tead, 1929; Uhl-Bien et al., 2007; Yukl, 2013.	1.1 Is it possessed by individuals (trait) or it can be developed (process)? Does it emerge naturally (emergent) or is it formally allocated (assigned)?
3.2.2 Related concepts: authority, coercion, control, persuasion, and power.	Bass, 1990c; Bowles, 2012; French & Raven, 1959; Grint, 2005; Fairholm & Fairholm, 2009; Hogg, 2010; Hollander, 1985; Northouse, 2015 ; Western, 2008b; Yukl, 2013.	1.2 How is leadership perceived/experienced (e.g., based on authority, coercion, control, persuasion, or power) in a contact centre context?
3.3 Leader		2. What is a leader in a contact centre context?
3.3.1 Attributes and competences.	Bennis & Thomas, 2002; Mumford et al., 2007; Van Velsor & McCauley, 2004; Yukl, 2013 ; Zaccaro et al., 2013	2.1 What is it required to be, become, or act as one?
3.3.2 Leaders and managers.	Bass, 1990c; Drucker, 1995; Kotter, 1995; Mintzberg, 1973; Toor & Ofori, 2008; Simonet & Tett, 2013 ; Zalzenik, 1977.	2.1 Are leaders and managers the same or they are different roles? Why?
3.4 Leadership practice		3. What leadership practice(s) is/are implemented in current contact centres:
Traditional theories individual-oriented	o <u>Trait</u> : 'Great Man', Trait theories.	Mann, 1959; Stogdill, 1948; Zaccaro et al., 2004.
	o <u>Behavioural</u> : <i>Ohio State & Michigan studies, Theory X/Y, and the Managerial Grid.</i>	Blake & Mouton, 1964; Fleishman, 1951; Katz et al., 1951; McGregor, 1957.
	o <u>Contingency</u> : <i>Contingency, Situational, Leader-Member Exchange, and Path-Goal.</i>	Dienesch & Liden, 1986 ; Fiedler, 1964; Graen, 1976 ; Hersey & Blanchard, 1969; House, 1971; Reddin, 1970
	o 'New Leadership': TFL, Charismatic, Visionary, Authentic, Servant	Bass, 1985 ; Burns, 1978 ; Conger & Kanungo, 1987; Greenleaf, 1970; House, 1976; Sashkin, 1987.
Emerging theories collective-oriented	o <i>Complexity and Relational Leadership</i>	Cunliffe & Eriksen, 2011; Lichtenstein et al., 2006; Marion & Uhl-Bien, 2001; Uhl-Bien, 2006.
	o <i>Distributed and Hybrid Leadership</i>	Gronn, 2000, 2002b, 2008, 2009b ; Harris, 2008, 2009; Leithwood et al., 2009a; Spillane, 2006; Bennet et al., 2003.
	o <i>Shared Leadership</i>	Pearce, 2004; Pearce & Conger, 2003b; Wassenaar & Pearce, 2012

Chapter 4 – Methodology

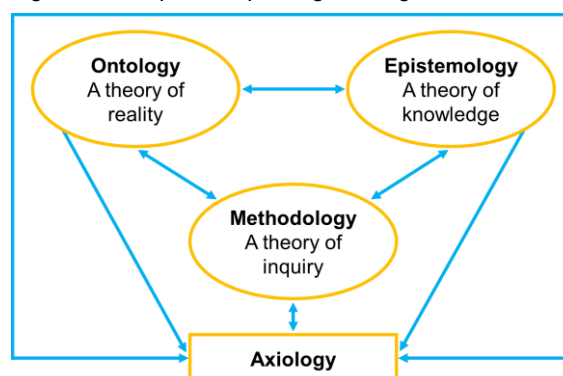
4.1 Introduction

This chapter presents the research philosophy and the research design applied in the current study. First, the philosophical dimensions that influence an academic research will be briefly described in order to gain a first-hand knowledge of their meaning and relevance. Then, an exploration of the research paradigm adopted in this study describing the ontological, epistemological, methodological, and axiological stances associated to it will follow, including the reasons that justified its choice. Finally, diverse aspects related to the research design applied in this study – such as sampling, research methods, or quality criteria – will be explained and discussed, to conclude with the ethical considerations and the limitations of the overall research.

4.2 Philosophy of Research

Research is “a process of systematic inquiry that is designed to collect, analyze, interpret, and use data [...] to understand, describe, predict, or control an educational or psychological phenomenon or to empower individuals in such contexts” (Mertens, 2015, p. 2). A philosophy of research, therefore, refers to the basic philosophical assumptions regarding ontology, epistemology, methodology, and axiology on which a research framework is based or adheres to (Burrell & Morgan, 1979; Lincoln, Lynham, & Guba, 2011; Morgan & Smircich, 1980). The combination of those assumptions (see Figure 4.1 below) leads to the emergence of different research paradigms or theoretical/philosophical perspectives (Blaikie, 2007; Crotty, 1998; Khun, 1963/2012).

Figure 4.1: Expanded paradigm triangle



Source: Klenke (2016), p. 18.

A paradigm is regarded as “a set of basic beliefs” (Guba & Lincoln, 1994, p. 107) that reflect the investigator’s particular worldview and actually define the philosophical assumptions that guide her/his thinking and research. As a theoretical framework, a paradigm provides focus and guidance for conducting research by describing how the topic is formulated and the information to be searched (Creswell, 2013; Grix, 2002; Guba & Lincoln, 1989).

In this regard, the literature has yielded numerous paradigms, whose diversity, overlapping claims, and differing terminology have spawned multiple classifications (e.g., Klenke, 2016; Crotty, 1998; Blaikie, 2007; Burrell & Mogan, 1979; Lather, 2006). Based on those classifications, the literature on the topic has usually distinguished two opposing research traditions (i.e., Positivism, Intepretivism), although a third, *middle-ground*, contrasting position (see Figure 4.2 below) was further incorporated to provide a broader understanding of the research paradigms in social science research (Aliyu et al., 2014; Antwi & Hamza, 2015; Bhaskar, 1975/2008; Bryman & Bell, 2015; Krauss, 2005).

Figure 4.2: The key research paradigms



Source: Grix (2010), p. 79.

This research has adopted an Interpretivist paradigm, which will be subject to analysis in the following section in order to clarify its suitability for and its impact on the present study.

4.2.1 Interpretivism. The Interpretive or Constructivist paradigm (see Table 4.1 below) has been successfully applied in leadership studies (e.g., Grint, 2005; Hotho & Dowling, 2010) and supports the aim of this study, which consists of understanding (*Verstehen*) the meaning of the social phenomena explored (i.e., leadership) rather than explaining such phenomena through universal laws (e.g., Positivism) or attempting to change them in order to emancipate individuals, remove power imbalances, challenge the existing socio-political situation, or transform the society (e.g., Critical Theory) (Appleton & King, 2002; Burrell & Morgan, 1979; Crotty, 1998; Lincoln et al.,2011).

Table 4.1: Basic beliefs of alternative inquiry paradigms – updated

Issue	Positivism	Postpositivism	Critical Theory et al.	Constructivism	Participatory*
Ontology	Naïve realism – “real” reality but apprehensible	Critical realism – “real” reality but only imperfectly and probabilistically apprehensible	Historical realism – virtual reality shaped by social, political, cultural, economic, ethnic, and gender values; crystallized over time	Relativism – local and specific co-constructed realities	Participative reality – subjective-objective reality, co-created by mind and given cosmos
Epistemology	Dualist/objectivist; findings true	Modified dualist/objectivist; critical tradition/community; findings probably true	Transactional/subjectivist; value-mediated findings	Transactional/subjectivist; co-created findings	Critical subjectivity in participatory transaction with cosmos; extended epistemology of experiential, propositional, and practical knowing; co-created findings
Methodology	Experimental/manipulative; verification of hypotheses; chiefly quantitative methods	Modified experimental/manipulative; critical multiplism; falsification of hypotheses; may include qualitative methods	Dialogic/dialectical	Hermeneutical/dialectical	Political participation in collaborative action inquiry; primacy of the practical; use of language grounded in shared experiential context

*Entries on this column are based on Heron & Reason (1997).

Source: Lincoln, Lynham & Guba (2011), p. 100.

Furthermore, the lack of leadership studies in contact centres favours the adoption of an Interpretivist paradigm because of its exploratory character by focusing predominantly on *understanding* the phenomenon within that environment instead of *explaining* its causes or effects (Bhaskar, 1975/2008; Blaikie, 2007; Grix, 2010).

Rooted in Phenomenology, Hermeneutics, and Symbolic Interactionism traditions, an Interpretive/Constructivist paradigm assumes that reality is socially constructed and further interpreted (Berger & Luckman, 1966; Blaikie, 2007; Blumer, 1969; Crotty, 1988; Mead, 1934). Individuals construct mentally their own reality through complex processes of social interactions and then assign them meanings based on their own perceptions and experiences (Burrell & Morgan, 1979; Schwandt, 1994), which results in diverse interpretations of the same reality or phenomenon – or, applied to the present study, multiple interpretations of leadership both conceptually and in practice – that lead consequently to the emergence of “multiple realities” (Krauss, 2005, p. 760).

This dynamic implies that meanings and interpretations are subject to continuous changes as they are constantly (re)negotiated through ongoing interactions between individuals, or between the researcher and participants (Berger & Luckman, 1966; Gergen, 1996; Lincoln & Guba, 1985) – an idea which also applies to the leadership notion and its changing nature as a result of individuals’ regular interactions within a contact centre.

Thus, constructions are simply “created realities” or “sense-making representations” of reality (Stringer, 1996, p. 41) produced by individuals to interpret their everyday world (Guba & Lincoln, 1989; Schwandt, 1994), which suggests the need to understand the different meanings and identify the contextual factors that influence individuals’ diverse interpretations of reality (Krauss, 2005). In consequence, the representations of the external world are not value-free but value-laden as they are shaped by individuals’ socio-cultural and historical backgrounds, implying that knowledge is not discovered nor produced independently of reality but socially constructed through individuals’ interactions within a particular context (Blaikie, 2007).

In this regard, a Constructivist paradigm follows a holistic approach to study social phenomena by considering the situational aspects of the context in order to gain a full understanding of the phenomenon within its particular environment (Freeman, 2008; Klenke, 2016). This feature is particularly suitable for studying leadership due to the variety of contextual factors (e.g., organisational culture, hierarchical structure) that may potentially influence individuals' understandings and experiences of leadership (Ayman & Adams, 2012; Osborn et al., 2014).

However, in order to really understand the meaning of social phenomena, it must be interpreted (Blaikie, 2007; Holstein & Gubrium, 2011; Mertens, 2015). As individuals make sense of their everyday world by means of constructions of their social reality, researchers need to develop an interpretation of such reality by generating a construction based on participants' own constructions (Schutz, 1967, 1970; Schwandt, 1994). This process portrays individuals as the primary data-gathering instruments and the researcher's role as the main research instrument in a constructivist (naturalistic) paradigm (Appleton & King, 1997; Guba & Lincoln, 1989).

Concisely summarised, the overall aim of Interpretivist/Constructivist research consists of "understanding the complex world of lived experience from the point of view of those who live it" (Schwandt, 1994, p. 221), which highlights the *emic* approach (i.e., the insider's view of reality) that characterises this paradigm. Thus, a constructivist perspective enables researchers to explore how people live and interact within their social world and build socially constructed representations of reality, while the interpretive perspective seeks to make sense of such representations and, ultimately, understand individuals' own world (Appleton & King, 2005). Those qualities actually align with the aim of this study in exploring, understanding, and interpreting the leadership phenomenon within the context of individuals' interactions and distinctive working environments.

Thus, the choice of an Interpretive/Constructivist paradigm is justified, considering (1) the subjective character of the data provided by participants; (2) the importance of interactions in participants' working routines and in building their respective perceptions of reality; and (3) the need to identify and understand participants' diverse perceptions and experiences of leadership in their particular environments. In addition, key aspects of this inquiry concur with

a naturalistic (i.e., constructivist) rather than with a positivist paradigm (see Table 4.2).

Table 4.2: Contrasting positivist and naturalist axioms

Axioms About	Positivist Paradigm	Naturalistic Paradigm
The nature of reality	Reality is single, tangible, and fragmentable.	Realities are multiple, constructed, and holistic.
The relationship of knower to the known	Knower and known are independent, a dualism.	Knower and know are interactive, inseparable.
The possibility of generalization	Time- and context-free generalizations (nomothetic statements) are possible.	Only time- and context- bound working hypotheses (idiographic statements) are possible.
The possibility of causal linkages	There are real causes, temporally precedent to or simultaneous with their effects.	All entities are in a state of mutual simultaneous shaping, so that it is impossible to distinguish causes from effects.
The role of values	Inquiry is value-free.	Inquiry is value-bound.

Source: Lincoln & Guba (1985), p. 37.

In line with an Interpretive/Constructivist paradigm (Guba & Lincoln, 1989; Lincoln et al., 2011; Refai, Klapper, & Thompson, 2015), this research adopted the following ontological, epistemological, methodological, and axiological stances.

4.2.1.1 Ontological position. This study followed a *relativist* ontology, which acknowledges the existence of multiple, socially constructed realities shaped by context (Denzin & Lincoln, 2011, 2013; Patton, 2015); specifically, there is not a single objective reality “out there” external to individuals but “multiple and dynamic realities” (Klenke, 2016, p. 15) that are context-dependent as a result of individuals’ interactions along with their own perceptions and interpretations (Appleton & King, 1997; Guba & Lincoln, 2005; Scotland, 2012). This position is consistent with the view adopted in this research, which acknowledges that each individual holds a unique understanding/interpretation of leadership that is also built through their interactions with others in a particular context.

However, the concept of *multiple realities* raises doubts on whether they are built individually through own’s cognitive processes (i.e., *constructivism* or *radical constructivism*) or collectively as a result of the social interactions in a particular context (i.e., *social constructionism*), being the latter the approach adopted in this study (Gergen, 1985; von Glasersfeld, 1989, 1991). Similar to managers and agents’ relationships and working practices in contact centres, Social Constructivism relies on multiple actors interacting with each other, and thus

collectively generating meaning and sharing interpretations in a given environment. Nevertheless, the terms Constructivism and Social Constructionism tend to be used indistinctly since they share the same ontology and epistemology (Blaikie, 2007; Crotty, 1998; Schwandt, 1994).

4.2.1.2 Epistemological position. A transactional/subjectivist stance was adopted as the epistemological position in this study (Guba & Lincoln, 1989; Lincoln et al., 2011), provided that the researcher and the object/subject of investigation interact and influence each other in the co-creation of understandings (i.e., subjectivism); as opposed to an objectivist or dualistic approach that assumes a duality between researcher and object/subject of study, whereby the former remains independent of the latter and cannot influence or be influenced by it (Appleton & King, 2002; Burrell & Morgan, 1979; Scotland, 2012). Consequently, the knowledge or findings are co-created by the researcher and the participants (i.e., transactional), emerging from the enquiry as the investigation progresses (Guba & Lincoln, 1989; Patton, 2015). In addition, knowledge is regarded as being psychologically, socially, culturally, and historically constructed rather than being discovered as in a positivist paradigm, thus reflecting the existence of different individuals' views on the same reality (Aliyu et al., 2014; Blaikie, 2007; Crotty, 1998; Scotland, 2012).

Such an approach involving the interaction between the researcher and the phenomena to be researched may render the distinction between ontology and epistemology "obsolete" (Lee, 2012, p. 408) as the conception of reality and how knowledge is obtained from that reality become confusingly merged into the same process (Guba & Lincoln, 1989; 2005).

4.2.1.3 Methodological position. This research followed a hermeneutical/dialectical approach to methodology (Adams & van Manen, 2008; Lincoln et al., 2011; Sloan & Bowe, 2014) on assuming that the social construction of reality is built on the interaction between the researcher and the participants through dialectical interchanges of meanings that lead inevitably to many different perspectives, whose further analysis – following a hermeneutical approach (e.g., Tan, Wilson, & Olver, 2009) – yields, consequently, multiple interpretations. As reality is continuously reconstructed through a dialectic

exchange, involving iterations, claims, analyses, and reiterations between researcher and participants, the process leads eventually to more informed and sophisticated reconstructions (Guba & Lincoln, 2005). Thus, reaching an understanding of the phenomenon under investigation is “participative, conversational, and dialogic” since it is produced in a dialogue through which meanings are mutually negotiated rather than reproduced by a researcher via analysis (Schwandt, 2000, p. 194).

Hermeneutics is “the theory and the practice of understanding and interpretation” (Freeman, 2008, p. 386), particularly applied to texts and speeches (i.e., language) as individuals’ expression of thoughts and feelings. As one of the major traditions in Phenomenology, Hermeneutical Phenomenology focuses on the study of phenomena (e.g., perceptions, memories, thoughts, emotions) as manifested and immediately experienced by individuals (Adams & van Manen, 2008; Schiemann, 2016; van Manen, 2014, 2016). In contrast to Phenomenology (Husserl, 1931, 1954/1970), Hermeneutical Phenomenology is not only concerned with descriptions of the phenomena (i.e., the *what* and the *how*) and their understanding, but also with the meanings attached to them in order to elaborate further interpretations since “understanding is interpretation” (Schwandt, 2000, p. 194) as both actions are intrinsically interrelated as human activities (Gadamer, 1960/2004; Holroyd, 2007; Holstein & Gubrium, 2011; Lavery, 2003; Sloan & Bowe, 2014). In addition, Hermeneutical Phenomenology is more complex than (descriptive) Phenomenology since the former acknowledges the influence of the socio-cultural and historical context in which individuals are embedded in order to provide a comprehensive account of their lived experiences (Freeman, 2008; Heidegger, 1962; Sloan & Bowe, 2014).

Accordingly, Hermeneutical Phenomenology aims at “recovering the living moment of the now” (Adams & van Manen, 2008, p. 617) through the analysis of spoken or written language (e.g., speeches, texts), considered as a truthful representation of the world (Holstein & Gubrium, 1994; Holroyd, 2007; van Manen, 1990/2016). Such endeavour involves, for instance, comprehensive readings and examination of texts (e.g., transcripts) to find expressed or intended meanings that help to build interpretations and thus achieve a proper

understanding of a phenomenon (Adams & van Manen, 2008; Gadamer, 1960/2004).

4.2.1.4 Axiological position. Axiology refers to how the researcher’s values and assumptions may influence the research process as it is assumed that the nature of qualitative research is value-laden and shaped by the researcher’s research experience, or the socio-cultural and historical context (Appleton & King, 2002; Creswell, 2013; Spencer et al., 2014).

As a result of acknowledging this potential influence, the researcher in the present study relied on personal honesty and integrity to ensure the veracity and rigor (i.e., authenticity, trustworthiness) of the research, as well as on the principles of reciprocity (e.g., by helping participants obtain a sound understanding of the phenomenon under investigation), rapport (e.g., by developing trusting and respectful relationships with participants), and fairness (e.g., by returning transcripts to respondents for data verification) (Cunliffe & Alcadipani, 2016; Guba & Lincoln, 1989; Harrison, MacGibbon, & Morton, 2001; Patton, 2015).

In addition, reflexivity, particularly important in qualitative research, was exercised as a regular practice (Etherington, 2007; Leavy, 2014; Naidu & Sliiep, 2011). Reflexivity refers to "the process in which researchers are conscious of and reflective about the ways in which their questions, methods and subject position might impact on the data and the psychological knowledge produced in a study" (Sloan & Bowe, 2014, p. 1297).

In sum, Table 4.3 below provides an overview of the paradigm and the philosophical positions adopted in this research.

Table 4.3: Paradigm and philosophical stances adopted in the present study

Interpretive/Constructivist			
Aim of inquiry	Focus of inquiry	Control	Researcher’s position
Understanding	Perceptions, beliefs, interactions, experiences, constructions, meanings, interpretations	Shared between participants and researcher	Interacting with the reality explored, facilitator, insider (<i>emic</i>) & outsider (<i>etic</i>)
Ontology	Epistemology	Methodology	Axiology
Relativist	Transactional/subjectivist	Hermeneutical/dialectical	Honesty, integrity, rapport, reciprocity, fairness, reflexivity

4.3 Research design

A research design “describes a flexible set of guidelines that connect theoretical paradigms first to strategies of inquiry and second to methods for collecting empirical material” (Denzin & Lincoln, 2013, p. 36), showing essentially how a research idea transforms into a research project to be implemented in practice along with the theoretical, methodological, and ethical considerations involved (Cheek, 2008).

Consistent with a Constructivist paradigm (Guba & Lincoln, 1989, 2005), the research design of the present inquiry was implemented in the natural setting where participants experience the phenomenon under investigation (i.e., contact centres), and the researcher did not alter its natural flow of change when observing, describing, and interpreting the individuals’ experiences and actions (Patton, 2015). A naturalistic inquiry-based design studies real-world situations as they unfold naturally, and is characterised mainly by its flexibility for introducing changes as the understanding of the topic increases (e.g., adding/removing interview questions to explore new themes) in order to adapt to the emerging nature of the research process (Creswell, 2013; Leavy, 2014; Lincoln & Guba, 1985; Saldaña, 2011).

4.3.1 Approach. Taking into account (1) the exploratory character of the research; (2) the aim of acquiring a holistic understanding of a complex, ill-defined phenomenon (i.e., leadership) in its natural setting; and (3) the need to capture participants’ experience of the phenomenon to reflect multiple perspectives, this research applied a qualitative methodology (Creswell, 2013; Denzin & Lincoln, 2011; Leavy, 2014), defined as:

a process of naturalistic inquiry that seeks in-depth understanding of social phenomena within their natural setting or context [and] relies on the direct experiences of human beings as meaning making agents in their everyday lives (Qualitative Research Network, University of Utah, 2009; cited in Klenke, 2016, p. 6).

The goal of a qualitative investigation is “to understand the complex world of human experience and behavior from the point-of-view of those involved in the situation of interest” (Krauss, 2005, p. 764). A qualitative methodology is usually

associated with interpretative/constructionist philosophies and an inductive approach, which clearly relates to the present study (see Table 4.4 below).

Table 4.4: Fundamental differences between quantitative and qualitative research strategies

	Quantitative	Qualitative
Principal orientation to the role of theory in relation to research	Deductive: testing theory	Inductive: generation of theory
Epistemological orientation	Natural science model, in particular positivism	Interpretivism
Ontological orientation	Objectivism	Constructionism

Source: Bryman (2016), p. 32.

More importantly, a qualitative methodology enables the researcher to gather rich and comprehensive data on individuals, contexts, behaviours, and interactions to build a holistic account of the reality explored (Klenke, 2016; Rose-Anderssen, Baldwin, & Ridgway, 2010) and “to explore leadership phenomena in significant depth” (Klenke, 2016, p. 5) as shown in diverse leadership studies (e.g., Butler et al., 2015; Cunliffe & Eriksen, 2011; Detert & Treviño, 2010; Hawkins, 2015; Glass & Cook, 2016); in contrast to the hypothesis-testing, causal-effect, prediction-oriented, and survey-dominated approach of the quantitative methodology typically applied in leadership research (Klenke, 2016; Ritchie et al., 2014).

4.3.2 Strategy. According to Creswell (2013), a qualitative research methodology can follow five main strategies (i.e., case study, ethnography, phenomenology, grounded theory, or narrative research), regarded as “a bundle of skills, assumptions, and practices that researchers employ as they move from their paradigm to the empirical world” (Denzin & Lincoln, 2011, p. 14).

This research adopted an (interpretative, hermeneutical) phenomenological design, which aims to gain an understanding of the phenomena from the social actors’ perspective by first describing the world as experienced by individuals and then interpreting the meanings further attached to those descriptions (i.e., double hermeneutics) (Gill, 2014; Groenwald, 2004; Sloan & Bowe, 2014; van Manen, 2014, 2016).

4.3.3 Purpose. As this research is particularly concerned with acquiring a rich, accurate, and greater understanding of the nature of a social phenomenon (i.e., leadership) in a particular environment by capturing the diverse interpretations of it as experienced by participants, the research purpose is

exploratory (Ritchie *et al.*, 2014; Saunders, Lewis, & Thornhill, 2016). An exploratory research is usually applied when the knowledge about the phenomenon (e.g., process, activity, and situation) subject to examination is limited or non-existent (Stebbins, 2001).

Exploratory research – widely applied in leadership studies (e.g., Fitzgerald *et al.*, 2013; Fukushige & Spicer, 2007; Sager, 2008; Wong & Law, 2002) – epitomises the practice of naturalistic inquiry in that it involves an investigation of an empirical world (e.g., individuals, relationships, activities) in its natural setting, rather than of a simulation or abstraction (e.g., laboratory) of such world (Blumer, 1969).

4.3.4 Logic. Considering (1) the exploratory character of this research, (2) the lack of leadership studies in contact centres, and (3) the need to identify the leadership theories found in that particular context, this research followed predominantly an inductive approach or logical reasoning (see Table 4.5 below). A qualitative methodology was applied and combined, to a lesser extent, with a deductive approach as both procedures are not mutually exclusive (Creswell, 2013; Klenke, 2016; Miles *et al.*, 2014; Reichertz, 2014; Saunders *et al.*, 2016; Saldaña, 2011).

Table 4.5: The logics of the four research strategies

	Inductive	Deductive	Retroductive	Abductive
Aim:	To establish universal generalizations to be used as pattern explanations	To test theories, to eliminate false ones and corroborate the survivor	To discover underlying mechanisms to explain observed regularities	To describe and understand social life in terms of social actors' motives and understanding
Start:	Accumulate observations or data	Identify a regularity to be explained	Document and model a regularity	Discover everyday lay concepts, meanings and motives
	Produce generalizations	Construct a theory and deduce hypotheses	Construct a hypothetical model of a mechanism	Produce a technical account from lay accounts
Finish:	Use these 'laws' as patterns to explain further observations	Test the hypotheses by matching them with data	Find the real mechanism by observation and/or experiment	Develop a theory and test it iteratively

Source: Blaikie (2007), p. 8.

Researchers should acquire previously basic knowledge of the literature and key concepts to evaluate and categorise appropriately the data in order to fully justify

the emergence of evidence following an inductive approach (Miller & Fredericks, 2003; Morse & Mitchan, 2002; Saunders et al., 2016).

Nevertheless, research is neither purely inductive nor deductive and most qualitative researchers adopt an intermediate position, so both logics of inquiry can be used to varying degrees at different stages due to the cyclical nature of the qualitative research process. In consequence, the approach in this research first involved a review of the existing theory in the early stages, consistent with exploratory research, to acquire basic knowledge of the topic of interest. Rather than developing hypotheses to be further tested, the review was directly followed by the data collection (Eriksson & Kovalainen, 2015; Gibson & Brown, 2009; Hennin, Hutter, & Bailey, 2011; Miles et al., 2014). The data collected enabled the identification of patterns to establish further generalisations that could potentially reveal how leadership is manifested, perceived, and/or experienced by individuals within a particular context, and that could also show a correspondence with existing theories (Blaikie, 2007).

4.3.5 Perspective. The perspective of enquiry refers to the approach to interpretation (Lincoln & Guba, 1985). Consistent with an Interpretive/Constructivist paradigm and a phenomenological methodology, this research followed an idiographic perspective, which consists of drawing specific interpretations and further conclusions on a particular phenomenon based on a single or limited number of cases without establishing generalisations beyond those cases due to their context-bound nature (Babbie, 2016; Crotty, 1998; Burrell & Morgan, 1979; Scotland, 2012).

The idiographic approach, which is linked to human sciences and qualitative research, is opposed to a nomothetic perspective (Luthans & Davis, 1982) and more associated with natural sciences and quantitative studies because the latter relies on a limited number of cases to make generalisations and formulate general laws based on those cases (e.g., behaviours, events, or processes) in order to make further predictions (Babbie, 2016; Burrell & Morgan, 1979; Crotty, 1998; Lincoln & Guba, 1985). Nevertheless, an idiographic approach, theoretically, can move from claims based on one single case to more general claims (Smith et al., 1995).

4.3.6 Quality criteria. As the traditional quantitative research criteria is not appropriate to assess the quality of a qualitative (naturalistic) inquiry, this research applied an alternative criteria (see Table 4.6 below) that is widely acknowledged within qualitative research (Denzin & Lincoln, 2011; Bryman et al., 2008; Eriksson & Kovalainen, 2015; Sin, 2010) and “meaningful within a constructivist inquiry” (Guba & Lincoln, 1989, p. 236).

Table 4.6: Traditional and alternative criteria for judging quality research

Traditional Criteria for Judging Quantitative Research	Alternative Criteria for Judging Qualitative Research	
	Trustworthiness	Authenticity
Internal validity	Credibility	Fairness
External validity	Transferability	Ontological authenticity
Reliability	Dependability	Educative authenticity
Objectivity	Confirmability	Catalytic authenticity
		Tactical authenticity

Source: Adapted from Guba & Lincoln (1989), pp. 233-251.

Credibility is the extent to which the results are credible or believable from the participants’ standpoint (e.g., through prolonged engagement, persistent observation, member checks), so there is a correspondence between participants’ constructed realities and the realities represented by researchers (Guba & Lincoln, 1989; Mero-Jaffe, 2011). *Transferability* refers to the extent to which the findings can be applied to other contexts or settings (e.g., by applying a purposive sampling, or thick descriptions), whereas *dependability* specifies the extent to which the same findings can be consistently obtained by independent investigators if the study is replicated (Cho & Trent, 2014; Klenke, 2016). Finally, *confirmability* indicates the extent to which the results can be corroborated or confirmed by others (e.g., through reflexivity, triangulation) and are not the product of the researcher’s biases, perspectives, interests, or motivations (e.g., Phillips, Dwan, Hepworth, Pearce, & Hall, 2014; Sin, 2010), which involves providing raw data or analysis notes for verification (Lincoln & Guba, 1985).

Along with trustworthiness, the authenticity of the evidence provided by the researcher (e.g., interview guide, informed consents, additional documentation) conform to the quality criteria in a qualitative inquiry (Guba & Lincoln, 1989; Manning, 1997; Shanon & Hambacher, 2014). Authenticity encompasses *fairness* (i.e., maintaining a balanced representation of participants’ perspectives)

and *ontological* (i.e., improving gradually participants' awareness and constructions of their social environment), *educative* (i.e., increasing participants' understanding and appreciation of others' standpoints), *catalytic* (i.e., triggering participants' action/decision-making towards change), and *tactical authenticity* (i.e., empowering participants to achieve change) (e.g., Phillips et al., 2014; Shanon & Hambacher, 2014; Shenton, 2004; Tyldum, 2012).

While there are diverse strategies to meet and assess those criteria (e.g., Onwuegbuzie & Leech, 2007b; Phillips et al., 2014; Shannon & Hambacher, 2014), triangulation stands out as a key practice that does not only enhance trustworthiness and authenticity in qualitative research, but also reduces the researcher's bias and increases the understanding of the phenomenon under study (Carter et al., 2014; Gibson, 2016; Turner et al., 2015). Triangulation can be accomplished via four procedures (i.e., through several data sources, data collection methods/methodologies, investigators, or theoretical perspectives for analysis/interpretation) (Denzin, 1978; Patton, 2015). As investigator and theory triangulation do not apply to this research, this study implemented data sources (i.e., agents, managers) and research methods triangulation (i.e., semi-structured interviews, focus groups, non-participant observation). Triangulation should not be used primarily to demonstrate the same results, but to identify consistency/discrepancies – assuming that different data sources/methods may generate different types of data – and thus identify conflicting data or patterns that enrich the analysis and eventually provide a broader understanding of the phenomenon (Carter et al., 2014; Patton, 2015).

4.3.7 Sampling strategy. A sample is “a selection of cases from wider populations” (Bloor & Wood, 2006, p. 154) to be included in a research project. Consistent with a naturalistic research design and a phenomenological methodology, a non-probability purposeful sample was applied as sampling technique for its capacity to generate theory using small samples (Creswell, 2013; Guba & Lincoln, 1989; Guetterman, 2015; Miles et al., 2014; Onwuegbuzie & Leech, 2007a; Patton, 2015). Purposeful sampling involves selecting those individuals who are likely to provide rich, deep, and meaningful information on the

phenomenon under study and thus acquire a comprehensive understanding of the research topic (Emmel, 2013; Etikan et al., 2016; Phillips, 2014).

More specifically, the application of a homogeneous purposeful sample includes individuals based on their similar or specific characteristics in order to study their common attributes or the social processes in which they are involved in a specified context; consequently, the sample was comprised of individuals sharing certain *criteria* to achieve homogeneity (Miles et al., 2014; Palinkas et al., 2015; Patton, 2015; Ritchie et al., 2014): i.e., participants who work as managers or agents (*job position*) at operational level in contact centres (*working environment*) situated in Scotland (*location*), since they are likely to have *lived experience* of the phenomenon under investigation (i.e., leadership) and, therefore, can provide rich and in-depth data on the topic of study based on their knowledge and/or experience (Creswell, 2013; Klenke, 2016; Laverly, 2003). A key advantage of a homogeneous purposeful sample lies in its capacity to build “a specific information-rich group that can reveal and illuminate important group patterns” (Patton, 2015, p. 267), which helps to study in depth a particular group.

While in quantitative research a sample size is critical to determine the generalisability of the findings, in qualitative research the findings are not intended to be generalised or representative of a population (Bowen, 2008; Onwuegbuzie & Leech, 2007a; Palinkas et al., 2015). In consequence, the sample size is less relevant as long as it provides meaningful and extensive data on the topic of study. This implies that the size is actually determined by data saturation – i.e., additional data does not provide new insights, as indicated by data replication or redundancy (Bowen, 2008) – since qualitative research is more concerned with reflecting the diversity of a given population rather than with making generalisations (Creswell, 2013; Klenke, 2016; Maxwell & Chmiel, 2014).

Samples should comprise between five and twenty-five participants in a hermeneutical phenomenological research, while a qualitative study requires between fifteen and fifty participants to be considered an acceptable sample, although using always primarily data saturation as a guiding principle (Creswell, 2013; Gentles et al., 2015; Klenke, 2016; Mason, 2010; Sloan & Bowe, 2014).

4.3.8 Research methods. Research methods are “the techniques or procedures used to gather and analyse data” (Crotty, 1998, p. 3). Qualitative research methods can add value to the study of leadership through extensive and thick descriptions of the phenomenon under investigation by capturing multiple voices and perspectives and by focusing on the lived experiences of the participants in their natural contexts. In addition, qualitative research methods enable to explore symbolic dimensions (e.g., interactions among individuals), which are important in leadership research (Klenke, 2016; Labuschagne, 2003). In line with a qualitative methodology, this research used multiple data collection methods, rather than relying on a single data source that could potentially increase the researcher’s bias (Blaikie, 1991; Eriksson & Kovalainen, 2015; Kerwin-Boudreau & Butler-Kisber, 2016; Saldaña, 2011; Saunders et al., 2016).

The use of a multi-method design:

- facilitates data collection from key respondents both individually (e.g., interviews) and collectively (e.g., focus groups, observations), thus providing a deeper understanding of the phenomenon;
- helps to overcome the limitations in one method using another method due to their capacity to complement each other; and
- enables the researcher to perform data triangulation and thus increase trustworthiness and authenticity (Guba & Lincoln, 1989; Kerwin-Boudreau & Butler-Kisber, 2016; Saldaña, 2011).

Multi-method designs using particularly semi-structure interviews, focus groups, and observations have been effectively implemented in qualitative leadership research, generating rich and relevant data on the topic under investigation (e.g., McKenzie & Locke, 2014; Sheppard & Brown, 2015; Tubin & Pinyan-Weiss, 2015).

4.3.8.1 Semi-structured interviews. Usually regarded as a flexible data collection method involving open-ended, general questions “with the purpose of obtaining descriptions of the life world of the interviewee in order to interpret the meaning of the described phenomena” (Brinkmann & Kvale, 2015, p. 6), semi-structured interviews are particularly suitable for exploring how individuals

experience and understand a particular complex phenomenon (Kallio, Pietilä, Johnson, & Kangasniemi, 2016; Klenke, 2016; Knapik, 2006; Roulston, 2011).

Unlike structured interviews, characterised by control and standardisation, semi-structured interviews are regarded as replications of an “everyday conversation” (Packer, 2011, p. 47) since interviewees benefit from more freedom to answer questions using their own words and researchers can pose additional questions to explore new angles and develop emerging themes in order to gather additional information (Brinkmann, 2013, 2014; Edwards & Holland, 2013; Kvale, 2007; Qu & Dumay, 2011). In this regard, it becomes critical to develop trust and confidentiality with interviewees and to adopt a non-judgemental attitude in order to build rapport and create a favourable atmosphere during the interview (Klenke, 2016; Roulston, 2010).

Although semi-structured interviews may present challenges and disadvantages (see Table 4.7 below), some do not really apply to qualitative research (e.g., validity, reliability, generalisability) or can be overcome through the interviewer’s learning capacity, skills, and experience (e.g., data analysis) (Brinkmann & Kvale, 2015; Saunders et al., 2016).

Table 4.7: Advantages and disadvantages of semistructured interviews

Advantages	Disadvantages
Positive rapport between interviewer and interviewee	Dependent on skill of the interviewer (ability to formulate questions during the interview) and ability of respondents to articulate answers
Results in high reliability	Not very reliable
Addresses and clarifies complex issues	Time consuming and expensive
Reduce prejudice on part of the interviewer (i.e., researcher predetermining what will or will not be discussed due to few predetermined questions)	Depth of information difficult to analyze
	Limited generalizability
	Lack of validity

Source: Klenke (2016), p. 132.

4.3.8.2 Focus groups. Focus groups are “a group of individuals selected and assembled by researchers to discuss and comment on, from personal experience, the topic that is the subject of the research” (Powell & Single, 1996, p. 499). This method allows to study an organisation’s reality from a social constructionist perspective since knowledge emerges from shared thoughts,

ideas, beliefs, opinions, and experiences generated from the group dynamics; but also to uncover a range of particular experiences from participants' own perspectives on a research topic (Ayudhya, Smithson, & Lewis, 2014; Belzile & Öberg, 2012; Duarte, Veloso, Marques, & Sebastião, 2015; Hennink, 2014).

As they are centred on a specific topic for a limited period of time, focus groups are regarded as an “in-depth research technique” (Babbie, 2016, p. 315) increasingly used in social sciences and business research. The researcher can pose probe questions to clarify responses because she/he can interact directly with participants, which can yield richer, deeper, and more nuanced understandings than other data-gathering methods due to their more natural approach to social interactions (Belzile & Öberg, 2012; Hydén & Bülow, 2003; Morgan, 2012; Parker & Tritter, 2006; Sagoe, 2012).

Focus groups are particularly suitable for exploratory research (see Table 4.8 below) on emerging social phenomena or little-known topics, for understanding group processes, and for investigating complex phenomena unsuitable for quantitative research (Belzile & Öberg, 2012; Frey & Fontana, 1991; Hennink, 2014; Morgan, 2012). Constructed groups, in particular, tend to articulate “more divergent views and greater complexities of the topic” (Leask, Hawe, & Chapman, 2006, p. 154) than natural groups and thus can provide a better understanding of the phenomenon under investigation.

Table 4.8: Different types of group method

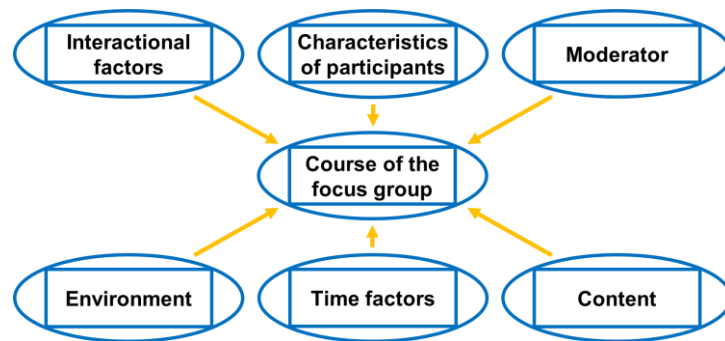
Group setting	Natural	Created
Purpose of research		
Exploration	Work-groups/Group observations	Group interviews/Focus groups
Generation	Work-team study/Group	Group simulations/Group meetings
Intervention	Team-building/Action research	Project group/Taskforce analysis

Source: Steyaert & Bouwen (2004), p. 142.

Focus groups can easily complement with other research methods and thus be used “to saturate understandings” (Kamberelis & Dimitriadis, 2013, p. 48-49) of issues partially disclosed or to perform triangulation in order to extend the data produced by other methods (e.g., semi-structured interviews, observation) (Barbour, 2014; Duarte et al., 2015; Eriksson & Kovalainen, 2015; Frey & Fontana, 1991; Sagoe, 2012).

Despite their strengths and advantages, focus groups can be difficult to analyse due to the multiple factors and interactions involved (see Figure 4.3 below). They can become intimidating or suppressing for those with differing views, preventing participants from sharing their real thoughts; and may not be suitable for obtaining/protecting data on sensitive topics (e.g., relationships with managers) since confidentiality is not fully guaranteed (Acocella, 2012; Franz, 2011; Hennink, 2014; Roulston, 2011; Sagoe, 2012).

Figure 4.3: Situational factors influencing the course of focus groups



Source: Vicsek (2007), p. 23.

In addition, viewpoints from dominant individuals may influence other participants in the discussion, and data analysis and conclusions might be biased by the researcher’s (mis)interpretations (Ayudhya et al., 2014; Duarte et al., 2015; Parker & Tritter, 2006; Smithson, 2000), affecting the data quality and trustworthiness.

4.3.8.3 Non-participant observation. Non-participant observation is a data collection method through which “the researcher enters a social system to observe events, activities, and interactions with the aim of gaining a direct understanding of a phenomenon in its natural context” (Liu & Maitlis, 2010, p. 610). Non-participant observation is generally regarded as a non-reactive method because it intends not to influence individuals’ behaviours on being observed, and unobtrusive because it seeks not to alter their natural flow of interactions to avoid interfering with the observed phenomena under investigation (Adler & Adler, 1994; Angrosino, 2004; Baker, 2006).

In addition, as the observation is performed in the natural environment where the phenomenon takes place, this research method can provide “authentic, rich

descriptions of the behavior of interest as it naturally exists and unfolds in its real context” (McKechnie, 2008b, p. 551), which allows to capture naturally occurring behaviour (Angrosino & Rosenberg, 2011; McKechnie, 2008a; Wells, 2010).

Those qualities make non-participant observation suitable for exploratory research involving topics hardly investigated and for studying complex phenomena, such as (1) social processes involving behaviours and dynamic interactions between individuals in their particular settings (e.g., Bridwell-Mitchell, 2016; Rosso, 2014); and (2) everyday life as experienced by participants (Liu & Maitlis, 2010; Wells, 2010), and thus generate “highly trustworthy data” (McKechnie, 2008a, p. 575).

Non-participant observation is usually associated with an Interpretivist, Constructivist paradigm because it acknowledges the interactions between observers and observed in the co-construction of knowledge, the meanings attached by participants to events and activities, and the importance of context (Gagnon & Collinson, 2014; McKechnie, 2008b).

A key advantage of observation is its capacity to be combined with and support other data collection methods (e.g., interviews, focus groups) (e.g., Bowen, 2008; Hong et al., 2016; Russell & McCabe, 2015), which adds valuable and contextualised insights into the dynamics of human interactions and behaviours within a working environment, and thus provide a deep and full understanding of the phenomenon under investigation (Liu & Maitlis, 2010; O’Toole & Grey, 2016; Wells, 2010). However, non-participant observation may also fail to capture the targeted interactions/activities or lead to misinterpretations, affecting data quality and their further analysis (Wells, 2010).

4.3.8.4 Data analysis: Interpretive Phenomenological Analysis. A qualitative data analysis “transforms data into findings” (Patton, 2015, p. 521) and facilitates the understanding and construction of meaning(s) attributed by participants to objects, events, or other individuals (Krauss, 2005); however, it does not follow a fixed and linear process but a spiral one that keeps the researcher moving in interrelated circles throughout the entire process, reflecting a flexible and non-standardised approach (Creswell, 2013).

Taking into account the need to capture individuals' perceptions and experiences on leadership in order to gain an in-depth understanding of it, this study applied an Interpretive Phenomenological Analysis (IPA) (Pietkiewicz & Smith, 2012; Smith, 1996, 2004; Eatough & Smith, 2008). IPA is particularly oriented to explore participants' lived experiences of a particular phenomenon (e.g., event, relationship, process, situation) and how they make sense of their experiences through an in-depth qualitative analysis that acknowledges the influence of the socio-cultural, historical context, and language (Clarke, 2009; Eatough & Smith, 2008). Such analysis does not only require an understanding of the participants' social world but also a further interpretation (i.e., descriptive and interpretative analysis).

IPA is theoretically rooted in Phenomenology, Hermeneutics, and Idiography (Gadamer, 1960/2004; Giorgi, 1995; Heidegger, 1962; Moustakas, 1994; Pietkiewicz & Smith, 2012; Smith et al., 2009), which explains its capacity for "the detailed examination of personal lived experience, the meaning of experience to participants and how participants make sense of that experience" (Smith, 2011, p. 9), yielding comprehensive descriptions of how they perceive the phenomena under investigation.

Although mostly applied in psychology, IPA has experienced an increasing popularity in diverse disciplines of social sciences (e.g., anthropology, sociology) conducting qualitative research (Smith, 1996, 2004, 2011; Wagstaff et al., 2014). Due to its flexibility, IPA can be combined predominantly with semi-structured interviews for their capacity to obtain meaningful and insightful data, but also with focus groups to generate rich information (Biggerstaff & Thompson, 2008; Palmer, Larkin, de Visser, & Fadden, 2010; Phillips et al., 2016; Tomkins & Eatough, 2010).

Among the different types of IPA analysis, this research applied Smith's interpretative phenomenology model (see Table 4.9 below), characterised by its emphasis on in-depth analysis of individuals' lived experiences following an inductive logic (Gill, 2014; Pietkiewicz & Smith, 2012; Smith, 2004).

Table 4.9: A typology of phenomenological methodologies

	Phenomenology				
	Descriptive phenomenology (Husserlian)			Interpretive phenomenology (Heideggerian)	
	Sander's phenomenology	Giorgi's descriptive phenomenological method	Van Manen's hermeneutic phenomenology	Benner's interpretive phenomenology	Smith's interpretative phenomenological analysis
<i>Disciplinary origin</i>	Organization studies	Psychology	Pedagogy	Nursing	Psychology
<i>Methodology as</i>	Technique	Scientific method	Poetry	Practice	Craft
<i>Aims</i>	To make explicit the implicit structure (or essences) and meaning of human experiences	To establish the essence of a particular phenomenon	To transform live experience into a textual expression of its essence	To articulate practical, everyday understandings and knowledge	To explore in detail how participants are making sense of their personal and social world
<i>Participants (sampling)</i>	3-6	At least 3	<i>Unspecified</i>	Until new informants reveal no new findings	1 or more
<i>Key concepts</i>	<ul style="list-style-type: none"> • Bracketing (<i>epoché</i>) • Eidetic reduction • Nomematic/noetic correlates 	<ul style="list-style-type: none"> • Bracketing (<i>epoché</i>) • Eidetic reduction • Imaginative variation • Meaning units 	<ul style="list-style-type: none"> • Depthful writing • Orientation • Thoughtfulness 	<ul style="list-style-type: none"> • The background • Exemplars • Interpretive teams • Paradigms cases 	<ul style="list-style-type: none"> • Double hermeneutic • Idiographic • Inductive
<i>Applications in organization studies</i>	Kram and Isabella (1985)	McClure and Brown (2008)	Gibson (2004)	Yakhlef and Essén (2012)	Murtagh, Lopes and Lyons (2011)

Source: Gill (2014), p. 122.

Accordingly, Smith's model favours idiographic approaches involving the analysis of limited cases in their unique contexts, and typically applies purposeful homogeneous samples of relatively small sizes (e.g., one to eight individuals/cases) that facilitates the study of each case and similarities and differences between individual and collective accounts (i.e., convergence and divergence analysis) (Cooper, Fleisher, & Cotton, 2012; Gill, 2014; Eatough & Smith, 2008; Wagstaff et al., 2014).

Smith's (1994) model requires the researcher to engage in an inductive and dynamic process of *double hermeneutics* whereby the researcher interprets the participants' interpretations of their world (Archer, Phillips, Montague, Bali, & Sowter, 2015; Gill, 2014; Pietkiewicz & Smith, 2012; Smith, 2011).

Generally, IPA involves adopting simultaneously an insider's perspective (i.e., *emic* position, by showing how participants experience and make sense of the phenomenon under study) and an outsider's perspective (i.e., *etic* position, by showing how the researcher interprets and associates the resulting data with existing concepts/theories) when exploring and analysing the participant's experiences (Clarke, 2009; Rodham, Fox, & Doran, 2015; Eatough & Smith, 2008).

Finally, IPA helps to develop an overall understanding of a phenomenon through a hermeneutical circle of thinking: when reading a word, paragraph, or text, their meanings can be understood/interpreted by examining the full sentence, the complete chapter, or the entire document, respectively; conversely, the full sentence, text, and document cannot be understood without their corresponding words, paragraphs, and texts, thus depicting a dynamic, relational, and non-linear relationship between the part and the whole at different levels which actually reflects an hermeneutical (iterative) circle of thinking and understanding (Gadamer, 1960/2004; Heidegger, 1962; Holroyd, 2007; Smith et al., 2009).

Issues. The application of IPA on focus groups data may apparently contradict its idiographic approach, which is focused on the detailed exploration of personal experience (Smith, 2004), since the analysis moves from individual to group level, thus increasing the difficulty of the interpretative process (Githaiga, 2014; Palmer et al., 2010; Tomkins & Eatough, 2010).

However, idiography does not refer necessarily to the *individual* (e.g., person, event, organisation), even if it is often conceived as such (e.g., Davis & Luthans, 1984; Wagstaff et al., 2014), but also to the *particular* in terms of the detailed analysis of a *particular* phenomenon (e.g., relationship, process) experienced by a *particular* individual/group of people in a *particular* context in order to explore the commonalities of their experiences within such context (Gill, 2014; Smith et al., 2009). Thus, idiography refers mostly to the particular, peculiar, or distinctive experience rather than to an individual. In fact, most studies use “a small sample rather than a single individual” (Pietkiewicz & Smith, 2012, p. 9) without contradicting IPA idiographic nature (e.g., Cooper et al., 2015; Johnson, 2016; Rodham et al., 2015; Shaw, West, Hagger, & Holland, 2016; Wagstaff et al., 2014), and move “cautiously” (Smith & Osborn, 2008, p. 230) from individual to group level analyses to elicit general statements applied to that group while retaining its capacity to retrieve and analyse individual data (Pietkiewicz & Smith, 2012; Smith, 2004; Smith et al., 2009; Storey, 2007). Furthermore, there has been an increasing interest in applying IPA to focus groups (e.g., Lamb & Cogan, 2016; Palmer et al., 2010; Phillips et al., 2016), showing that IPA can combine group patterns analyses with individual accounts.

Irrespective of how idiography is conceived, a balanced approach reflecting both individual and collective contributions is recommended, considering the need to apply the hermeneutical circle rationale: i.e., an individual is limited by the group context but the group level dynamics depend on its individual members; then, a deeper understanding should comprise a combination of the two (Pietkiewicz & Smith, 2012; Smith et al., 2009; Tomkins & Eatough, 2010).

In addition, the shift from a researcher’s interpretation of a participant’s own interpretations (i.e., double hermeneutic) towards a group context requires a researcher’s interpretation of the participant’s own and of others’ interpretations (i.e., multiple hermeneutic), which can be overcome by:

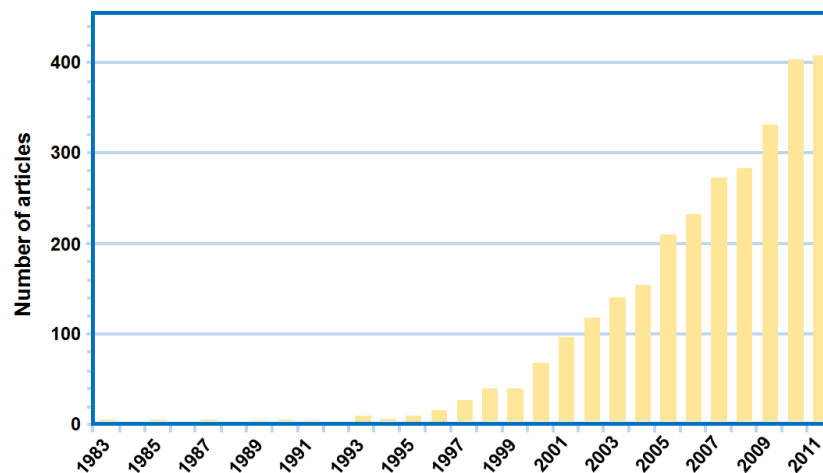
- complementing real-time and *post-hoc* analysis in order to maximise the interpretative effort (Tomkins & Eatough, 2010);
- analysing first group patterns and then individual accounts (Smith, 2004); or

- acknowledging the group as unit of analysis and clustering the *characteristic* themes as group-level themes rather than as individual contributions, since Phenomenology is also interested in individual-group relationships in order to capture “the essential structure of a phenomenon” (Tomkins & Eatough, 2010, p. 245) along with its constituent parts.

Actually, the researcher’s and the participants’ diverse perspectives of the same phenomenon involved in double hermeneutics contribute to gain a more complete understanding of it (Wagstaff et al., 2014).

NVivo support. The qualitative data analysis was assisted by NVivo software, considering its capacity for detailed analysis and for managing multiple codes (Auld et al., 2007; Bazeley & Jackson, 2013). The use of data-analysis software in academic qualitative social research has experienced an increasing trend in the last decades (see Figure 4.4 below).

Figure 4.4: The number of refereed papers published using qualitative methods that used CAQDAS, 1983–2011



Source: Gibbs (2014), p. 279.

NVivo is a suitable tool for data analysis in qualitative research – applying a hermeneutic phenomenological methodology or a social constructionist epistemology (De Felice & Janesick, 2015; Goble, Austin, Larsen, Kreitzer, & Brintnell, 2012; Kikooma, 2010) – and, particularly, for IPA due to its capacity for thematic coding, managing themes, and thematic comparison across cases (Auld et al., 2007; Gibbs, 2014; Smyth, 2006). Besides saving time on coding, processing queries, or data retrieval, NVivo can enhance the trustworthiness of the qualitative research process and open new lines of analysis (Siccama &

Penna, 2008), but also requires appropriate training – which the researcher undertook as part of his PhD programme – to fully exploit its capabilities. NVivo software does not replace researchers to perform data analyses, synthesis, or interpretations; but facilitates the coding of the data for easy identification and supports the researcher’s inductive approach and critical thinking (Auld et al., 2007; Bazeley & Jackson, 2013; Bernauer, Lichtman, Jacobs, & Robinson, 2013; Johnston, 2006; Smyth, 2008; Welsh, 2002).

In summary, Table 4.10 below provides an overview of the research design implemented in this research.

Table 4.10: Research design of the present study

Research design				
Approach	Strategy	Purpose	Logic	Perspective
Qualitative methodology	Phenomenology	Exploratory	Inductive	Idiographic
Quality Criteria	Sampling strategy	Research methods		
Trustworthiness, authenticity	Purposive	Data collection <ul style="list-style-type: none"> • Semi-structured interviews • Focus groups • Non-participant observation 		Data analysis <ul style="list-style-type: none"> • IPA (assisted by NVivo software)

4.4 Ethical considerations

The research framework was reviewed by the University’s Research Integrity Committee, who provided ethical approval prior to data collection. The framework strictly adhered to the guiding principles specified in the Code of Practice on Research Integrity of Edinburgh Napier University (ENU, 2013; Miller, Birch & Mauthner, 2012; Wiles, 2012): honesty; rigor; transparency and open communication; care and respect; and accountability (Cunliffe & Alcadipani, 2016; Etherington, 2007; Hannes, Heyvaert, Slegers, Vandenbrande, & van Nuland, 2015; Hammersley, 2015; Hiles, 2008; Leitch et al., 2010; Mitchell & Irvine, 2008; Vanclay, Baines, & Taylor, 2013).

In addition, the Code of Practice contains a series of standard procedures that were followed rigorously. In the first place, the researcher did not cause harm to participants, and made sure that they were free from coercion and not pressured during the study (Hennink, 2014; Ogden, 2008; Qu & Dumay, 2011). In this

sense, participants had the right to withdraw at any stage without further questions (Vanclay et al., 2013). The researcher also identified and assessed any potential risk (e.g., confidentiality in focus groups) to minimise it and to inform participants of their existence (Smithson, 2008; Wiles, Crow, Heath, & Charles, 2008).

As the relationships with participants and other third parties were based on honesty, the researcher acted accordingly and provided in advance accurate, clear, and sufficient information about the study (e.g., information sheet, interview guide) to participants so that they can make an informed decision regarding their participation and to provide their informed consent, including explicit permission for audio-recording (Hennink, 2014; Richardson & Godfrey, 2003). The interview/focus group context can create an asymmetric power relation between the researcher and the participants since the former selects the topic(s) for discussion, initiates and ends the interview, or decides which answers should be extended (Brinkmann & Kvale, 2015; Packer, 2011; Qu & Dumay, 2011; Roulston, 2010). Thus, participants had the right to review and modify the transcripts as a way to increase equality, transparency, and open communication (Locke & Velamuri, 2009; Mero-Jaffe, 2011; Vanclay et al., 2013). In the same vein, the role exclusively held by the researcher to describe and explain his observations was complemented with the participants' perspectives retrieved after the observation sessions in order to build a collaborative account of the phenomenon (Liu & Maitlis, 2010).

Likewise, participants' confidentiality and anonymity was ensured in order to protect their identity and privacy, according to the guidelines of the Data Protection Act 1998 (ENU, 2013; Lancaster, 2016; Parker & Tritter, 2006; Wiles et al., 2008). However, those principles cannot be fully guaranteed in focus groups as participants could share the content of the discussions with individuals outside the group, exposing a potential risk regarding the confidentiality of the information discussed in a session; in consequence, the researcher encouraged participants to respect individual's privacy (Franz, 2011; Hennink, 2014; Sagoe, 2012; Smithson, 2011).

As part of its ethical commitment, the research findings were made available to the parties involved in the study (i.e., participants, supervisors, and the University

through which the study was conducted), and it was ensured that their contribution and support was properly acknowledged (e.g., data provision, academic guidance, funding support) (Locke & Velamuri, 2009). Finally, the researcher was aware of his responsibility to report any suspected misconduct to the appropriate authorities (ENU, 2013), such as unethical practices to gain access; for instance, Miller & Bell (2012) reported that gatekeepers in high hierarchical positions within organisations may influence potential participants who are “less powerful and therefore less able to resist voluntary participation” (p. 10) in interviews. That potential unethical situation has been prevented by explaining clearly in advance the research to participants, informing them of their rights and scope of participation, and using the consent form for their reassurance so that participation was “renegotiated” (Miller & Bell, 2012, p. 15) between researched and researcher.

4.5 Research limitations

This study presents several limitations. First, the complex and abstract nature of leadership might potentially inhibit some participants’ contributions due to the lack of clarity about the meaning of the concept (Rumsey, 2013b; Yukl, 2013). Although time was allocated for resolving doubts prior to each interview/focus group (Edwards & Holland, 2013; Kvale, 2007), they were not intended to explain the concept as the research aimed precisely to capture participants’ perceptions and experiences on leadership, so their answers might still be restrained by the confusion around the concept and yield eventually ambiguous data.

In addition, it was acknowledged that participants may have preconceived ideas on the research topic and they might have also provided socially accepted answers caused by their willingness to avoid potential disappointment or by fear that their feedback may be divulged (Adamaitis & Bernardi, 2006; Latkin *et al.*, 2016), given that the data collection also involved focus groups and took place in the contact centres premises where they worked. In order to address the participants’ response bias, they were informed about the value of their individual views, even if divergent or unconventional, in order to encourage them to reveal their true viewpoints and beliefs. Likewise, they were reminded that their feedback would be completely confidential, analysed in a non-judgemental way,

and further anonymised to make them feel self-assured when expressing their thoughts. Besides, agents and managers were interviewed separately to avoid potential bias between both groups holding different hierarchical positions within the same organisation (ENU, 2013; Lancaster, 2016; Richardson & Godfrey, 2003; Saldaña, 2011; Wiles et al., 2008).

The application of an Interpretative/Constructivist paradigm and a phenomenological methodology involves an *emic* role for the researcher, who acted as an *insider* by interacting with participants and building shared interpretations of the phenomenon explored (Lincoln & Guba, 1985; Robinson & Kerr, 2015). The active role of the researcher is acknowledged in an Interpretative/Constructivist paradigm and a Phenomenological methodology on being regarded as the main research instrument (Creswell, 2013; Lincoln et al., 2011); however, her/his analyses, interpretations, and conclusions might be subject to bias, which was counteracted by maintaining moral integrity (e.g., honesty, fairness, critical assessment) in interviews, developing skills and experience as moderator in focus groups, and following a systematic and rigorous approach to observation and data analysis involving reflexivity, triangulation, member checking, and detailed descriptions on the phenomenon to increase trustworthiness (Hennink, 2014; Kvale, 2007; McKechnie, 2008a).

A qualitative methodology, especially involving the application of a non-probability homogeneous purposeful sampling, does not allow to draw generalisations applied to the entire population (i.e., Scotland's contact centre industry) and, therefore, findings are not representative (Bryman et al., 2008; Guetterman, 2015; Etikan et al. 2016; Palinkas et al., 2015). While the findings of this research might still generate theoretical/inferential generalisations or extrapolation (Lewis et al., 2014; Patton, 2015; Polit & Beck, 2010), i.e., *transferability* according to Guba & Lincoln (1989), based on the homogeneity achieved through purposeful sampling, a qualitative study is not concerned with making generalisations or being representative but with acquiring an in-depth understanding of the phenomenon explored in order to generate a comprehensive account of it (Creswell, 2013; Saunders et al., 2016).

Some participants can feel uncomfortable during interviews/focus groups for being audio recorded and may refrain from expressing their real thoughts, thereby

affecting potentially data reliability (Roulston, 2011; Saunders et al., 2016; Smithson, 2008). Focus groups can also present limitations for generating relevant information due to participants' inhibitions, limited range of experiences within small groups, or the researcher's ability to stimulate interactions and discussions; while, in non-participant observations, the researcher's presence can also exert a potential influence on participants' behaviours (Acocella, 2012; Franz, 2011; Hennink, 2014; Krueger & Casey, 2015; McKechnie, 2008b; Wells, 2010). In consequence, the researcher ensured the confidentiality and anonymity of the data collected during interviews and non-participant observations, taking any possible measure to minimise the potential reactivity of the latter that, otherwise, may disappear over time through familiarisation (Liu & Maitlis, 2010; McKechnie, 2008c). In addition, the researcher adopted an interactive and dynamic role in focus groups to build a comfortable environment that facilitates communication and interactions among participants (Belzile & Öberg, 2012; Eriksson & Kovalainen, 2015; Franz, 2011; Morgan, 2012).

Non-participant observation cannot capture cognitive processes as they are not directly observed, could also fail to capture the targeted interactions/activities, or develop self-identification and thus bias since the researcher's values and beliefs were "an inherent part of the research process" (Liu & Maitlis, 2010, p. 611), influencing the data trustworthiness and their further analysis. Those limitations were counterbalanced through reflexivity, triangulation of sources/methods, member checking (i.e., posing questions to participants after the session), and accurate descriptions of the phenomenon observed (Angrosino, 2004; Gold, 1958; McKechnie, 2008a, 2008b).

In terms of data analysis, the adoption of a phenomenological methodology and the application of IPA assign the researcher a key role in the research process, whose findings might be delimited by the researcher's skills and experience during data collection and the further analysis and interpretation (Smith et al., 2009; Robinson & Kerr, 2015). In addition, as IPA is still underdeveloped within psychology, its effectiveness as an analytical tool in other disciplines is difficult to evaluate (Clarke, 2009). Nevertheless, the study followed Smith et al.'s (2009) acknowledged framework to corroborate and maximise the data analysis process. Likewise, the potential impact on the research practices and

trustworthiness derived from the use of NVivo for data analysis (Bazeley & Jackson, 2013; Gibbs, 2014; Goble et al., 2012; Woods, Macklin, & Lewis, 2016) was minimised by applying self-reflection, showing convergent/conflicting opinions, answering the research questions through the gathered data, and providing transcripts and field notes to corroborate the analysis (Roulston, 2010; Smyth, 2008).

Finally, a key limitation relates to getting access to key individuals and organisations. Since it is particularly challenging to gain permission to interview both managers and agents, and perform observations in contact centres in order to obtain relevant information from both groups, access was negotiated by using gatekeepers and the researcher's personal online network (i.e., LinkedIn), guaranteeing the strict confidentiality and anonymity of the data provided, and constantly emphasising the integrity and transparency of the research process (Clark, 2011; Cunliffe & Alcadipani, 2016; Karjalainen, Niemistö, & Hearn, 2015; Peticca-Harris, deGama, & Elias, 2016; Taylor & Land, 2014; Tyldum, 2012).

4.6 Summary

This chapter has discussed the key components underlying the research philosophy that guided this study as well as the methodology which was implemented to investigate and acquire a comprehensive understanding of the leadership phenomenon in contact centres. While the intellectual background of the research paradigm provides a theoretical base that underpins this academic research, the methodological choices (e.g., approach, strategy, purpose) and the research methods employed for data collection and analysis (e.g., semi-structured interviews, IPA) build a practical framework that enabled the researcher to conduct the investigation. Finally, this chapter has explored the ethical considerations and limitations involved in this study, providing options to minimise their respective impact.

The implementation of the research design has generated substantial data whose analysis will be conducted in the following chapter.

Chapter 5 – Analysis, Findings, and Discussion

5.1 Introduction

In this chapter, an analysis of the data collected from the interviews, focus groups, and non-participant observations will be performed in order to identify the main research findings and their relevance in relation to the research questions posed in Chapter 3, p. 108.

The analysis, whose content will follow the same structure as the Interview Guide, will involve a description of the key themes identified in the transcripts and observation notes, and will include participant's quotations to support the arguments and the findings emerged from the data. That first step will be followed by an examination of the meaning of those findings and their subsequent interpretation, which will be contrasted with the existing research included in the Literature Review and the Context-Setting chapters in a discussion that will also consider their importance and further implications.

In order to determine the viability of performing academic research on leadership in contact centres, a pilot study was conducted and its details, including the findings, are summarised in Appendix C, p. 246. Prior to the analysis, there were a series of decisions regarding the data collection that will be discussed in the following section in order to provide a detailed account of the research process.

5.2 Research process

This section draws attention to the decisions made before the data collection phase, which are those concerned with the sample, the interview guide, the access to organisations, the procedures regarding each research method, and the data collection itself.

5.2.1 Sample. Following the application of a (non-probability) homogeneous purposeful sample (Suri, 2011; Miles et al., 2014; Patton, 2015), semi-structured interviews and focus groups targeted managers and agents at operational level, respectively, as they were likely to provide rich data based on their shared characteristics (i.e., roles performed at operational level in Scottish contact centres, and key knowledge on the industry) and *lived experience* of the

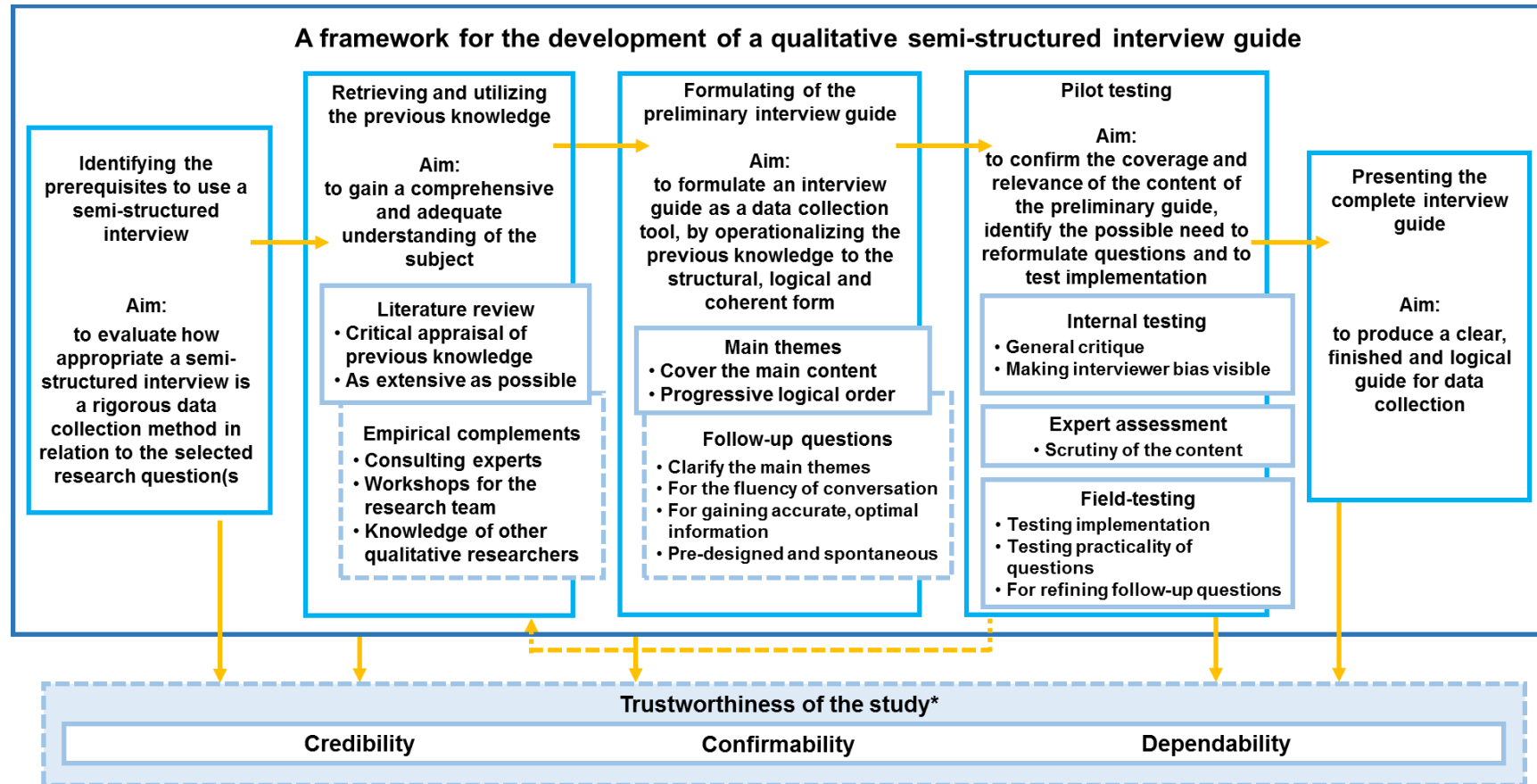
phenomenon under investigation (i.e., leadership in a contact centre environment); thus, non-participant observations also involved both groups (Brinkmann & Kvale, 2015; Krueger & Casey, 2015; McKechnie, 2008b).

Consistent with a naturalistic inquiry and a qualitative methodology, the criterion to determine the sample size was based on data saturation, whereby the data collection process reaches a stage in which the interviews/focus group sessions do not generate new data (Bowen, 2008; Edwards & Holland, 2013; Gentles et al., 2015; Mason, 2010; Onwuegbuzie et al., 2009; Saunders et al., 2016). In fact, a minimum sample of six interviews can be "sufficient to enable development of meaningful themes and useful interpretations" in studies with high homogeneous group members (Guest et al., 2006, p. 78), while a maximum of eight focus group sessions are considered satisfactory to avoid replicating existing data and ensure that valuable data has been extensively collected in order to answer the research question(s) (Jarvis & Barberena, 2008; Logie, 2014).

5.2.2 Interview guide. The interview guide, used for both semi-structured interviews and focus groups, was informed by the theory and empirical research explored in the Literature Review chapter (Rowley, 2012; Kallio et al., 2016). The guide was generated by following a developmental framework (see Figure 5.1 below), which involved a pilot testing conducted in the first contact centre to assess the questions' suitability and make the necessary changes (Turner, 2010; Castillo-Montoya, 2016; Barbour, 2007; Neuman, 2014). This procedure ensured consistency with the research questions and enhanced the study trustworthiness (Krueger & Casey, 2015; Stewart & Shamdasani, 2015; Kallio et al., 2016).

5.2.3 Access. In order to gain access to the sites, an information sheet explaining the research purpose, the data collection process, and the confidentiality and anonymity principles guiding the research was sent to managers through the researcher's University e-mail account to request their participation in the research (Noy, 2009; Edwards & Holland, 2013; Wiles et al., 2008; Krueger & Casey, 2015).

Figure 5.1: The phases of a semi-structured interview guide development based on the synthesis/review (*added based on the section of discussion).



Source: Kallio, Pietilä, Johnson & Kangasniemi (2016), p. 9.

Files containing the interview guide (to provide participants enough time to prepare their answers), additional information regarding the procedures for each data collection method, and an informed consent form (to ensure the participants' rights) (Ibrahim & Eadgley, 2015; Klenke, 2016; Sagoe, 2012) were also attached to each message (see Appendix C, pp. 249-259). Additional e-mails were sent if managers did not reply within three days after the first contact (Noy, 2009; Rowley, 2012; Krueger & Casey, 2015).

Once managers agreed to participate in the research, they sent internal e-mails on behalf of the researcher to the agents who had also expressed their willingness to participate in order to provide them in advance with the information sheet and all the necessary documentation regarding the research process (see Appendix C, p. 260) (Edwards & Holland, 2013; Creswell, 2014; Sagoe, 2012).

After the managers and agents had confirmed their participation and the dates and times were arranged, follow-up e-mails were sent one week prior to the scheduled data collection to remind them of the location, dates, and times for the interview, focus group, and non-participant observation sessions (Noy, 2009; Rio-Roberts, 2011).

5.2.4 Procedure for interviews and focus groups. The interview and focus group sessions were conducted in meeting rooms at the participants' respective workplaces to be in a familiar environment where they felt comfortable and free to express their views and thus enhance their contributions (Brinkmann & Kvale, 2015; Logie, 2014; Hennink, 2007, 2014). For focus groups, the seats/tables were arranged in a circle prior to each session to facilitate participants' interactions and discussions (Acocella, 2012; Jarvis & Barberena, 2008; Morgan, 2012; Stewart & Shamdasani, 2015).

Prior to each interview/focus group, participants were reminded of the research purpose, the uses of the data collected, the confidentiality and anonymity principles, their right to withdraw at any time without further questions; and were offered the opportunity to pose research-related questions. Afterwards, the researcher collected the signed informed consents and provided a copy to each participant (Brinkmann & Kvale, 2015; Ibrahim and Edgley, 2015; Jarvis & Barberena, 2008; Klenke, 2016; Mitchell & Irvine, 2008; Sagoe, 2012).

The interview guide comprised four basic questions with relevant sub-questions which acted as guidance (Rio-Roberts, 2011; Qu & Dumay, 2011), but the interview/focus group sessions developed as a flexible process that helps to formulate additional/probing questions in order to explore emerging themes or different angles. That process reflects an ongoing analysis and active questioning as well as a dynamic co-construction process of the data with participants to identify hidden meanings (Ryan et al., 2014; Parker & Tritter, 2006; Rabionet, 2011; Rowley, 2012; Hennink, 2014; Brinkmann & Kvale, 2015; Klenke, 2016). In addition, a flexible and non-judgemental approach was adopted and implemented. Active listening (e.g., physical orientation, eye contact, paraphrasing, reflecting) was also employed by paying close attention to interviewees and their responses (Edwards & Holland, 2013; Saldaña, 2011; Sagoe, 2012; Logie, 2014) in order to ensure “accurately hearing and interpreting the speaker's verbal and nonverbal communication” (Ayres, 2008b, p. 8).

For interviews, an *emic* (*insider*) and *etic* (*outsider*) perspective was adopted alternatively, acknowledging its interactive role in the co-construction of knowledge but also exercising constant reflexivity throughout the interview process that further enhanced transcription quality and trustworthiness (Ibrahim & Edgley, 2015; Kvale, 2007; Qu & Dumay, 2011; Roulston, 2011; Witcher, 2010).

For focus groups, the role of initiating and facilitating the interaction and discussion between participants (e.g., making them feel comfortable, ensuring equal participation) was adopted to maximise valuable data collection, rather than directing the discussion, as the former was a less-structured and more suitable strategy for exploration and discovery and created a climate that stimulated participants' contributions (see Table 5.1 below). After posing a question, the researcher waited for the answer to be generated from the diverse opinions expressed in the group discussion. Interviews and focus groups were audio-recorded and field notes were taken with previous permission (Acocella, 2012; Parker & Tritter, 2006; Sagoe, 2012; Acocella, 2012; Belzile & Öberg, 2012; Ryan et al., 2014; Frey & Fontana, 1991; Morgan, 2012; Hennink, 2014).

Table 5.1: Comparison of more and less structured approaches to focus groups

More Structured Approaches	Less Structured Approaches
Goal: answer researchers' questions	Goal: understanding participants' thinking
Researchers' interests are dominant	Participants' interests are dominant
Questions set the agenda for discussion	Questions guide discussion
Larger number of more specific questions	Fewer, more general questions
Specific amounts of time per question	Flexible allocation of time
Moderator directs discussion	Moderator facilitates discussion
Moderator "refocuses" off-topic remarks	Moderator can explore new directions
Participants address moderator	Participants talk to each other

Source: Morgan (2002), p. 147.

The minimum length for interviews was one hour; for focus groups was one hour and a half; and for observations was two hours split into two sessions, which is considered to be suitable taking into account the researcher's non-participant role and the time limitations in each site (Baker, 2006; Onwuegbuzie et al., 2009; Rowley, 2012; Sagoe, 2012; Stewart & Shamdasani, 2015).

Verbatim transcriptions (adding field notes) were created on the same day of the interview/focus group session to facilitate familiarity with the data and minimise errors (Hammersley, 2010; Rio-Roberts, 2011; Krueger & Casey, 2015; Mero-Jaffe, 2011; Rowley, 2012; Brinkmann, 2014; Eriksson & Kovalainen, 2015), which increases trustworthiness, provided valuable insights into the content and facilitated further analysis (Poland, 1995; Davidson, 2009; Saldaña, 2011; Sagoe, 2012; Brinkmann & Kvale, 2015).

Once the transcripts were completed, they were emailed back to each participant for revision and changes in order to enhance authenticity and trustworthiness, but also to obtain participants' approval regarding the content and thus comply with ethical principles (e.g., fairness and equality principles, informing interviewees, reducing power imbalance) (Brinkmann & Kvale, 2015; Knapik, 2006; Jonsen & Jehn, 2009; Krueger & Casey, 2015; Mero-Jaffe, 2011; Roulston, 2010; Rio-Roberts, 2011).

5.2.5 Procedure for non-participant observations. The observations were split into two sessions of one hour each and focused on staff interactions at operational level as this timeframe enabled the researcher to reach data saturation, which occurs when "the observer learns nothing new from continued

observation” (McKechnie, 2008a, p. 574). Rather than implementing observations directly, a literature review was conducted to identify key concepts and relevant theories that informed the observation process (McKechnie, 2008a). Based on the current prevailing model of collaborative research, which also ensured the rigor required in academic studies, a balanced perspective was adopted by following a systematic approach to observation as an *outsider*, and by not distancing themselves from the phenomenon studied, thus considering participants as interacting partners in the data collection process (Angrosino & Rosenberg, 2011; Baker, 2006; Creswell, 2013; McKechnie, 2008a). Since the participants were aware of the researcher’s presence and purpose, an overt (non-participant) observation was implemented by adopting an *observer-as-participant* role (see Figure 5.2 below): i.e., non-obtrusive, by just observing without posing questions; avoiding participation in the activities or interaction with participants observed; and taking notes from a distance (Adler & Adler, 1994; Baker, 2006; Creswell, 2013; Gold, 1958; Liu & Maitlis, 2010; Spradley, 1980; Wells, 2010).

Figure 5.2: Typology of participant observation researcher roles



Source: Saunders, Lewis & Thornhill (2016), p. 358

The process itself consisted of observing closely and directly the interactions among the agents and the managers previously interviewed when performing their working routines and standard procedures in order to capture their respective leadership practices, which further enabled the researcher to identify the existing leadership theories implemented in each site (Gold, 1958; Liu & Maitlis, 2010; Nicholls et al., 2014).

This approach, usually employed in one-visit interviews (Gold, 1958), maintained a consistent data collection approach to avoid disrupting “the normal flow of activities” (McKechnie, 2008a, p. 575) and interactions between participants (Angrosino, 2004; Creswell, 2013). This first stage followed three sequential observation phases (Spradley, 1980; Angrosino & Rosenberg, 2011): *descriptive*, by capturing every conceivable aspect of a situation to obtain an overview of the setting; *focused*, by concentrating on certain group activities; and *selective*, by focusing exclusively on emerging themes and the relationships of certain aspects (McKechnie, 2008b; Liu & Maitlis, 2010). During this first stage, observation involved a cyclical process combining alternatively inductive and deductive reasoning: themes identified through observed behaviour may suggest areas for further observations, which subsequently identified new themes that equally triggered additional observations (McKechnie, 2008a).

After each observation session, questions were posed to participants to clarify potential misunderstandings regarding participants’ activities and interactions during the non-participant observation stage in order to ensure the accurate interpretation of the data collected, and thus increase trustworthiness (Baker, 2008; Liu & Maltis, 2014).

The overall process generated detailed field notes on multiple aspects of the research settings and the participants (Ostrower, 1998; Liu & Maitlis, 2010) that enabled the researcher “to discover what people do and with whom, what is happening, and if there are any trends and patterns discernible in these activities” (McKechnie, 2008a, p. 575), including their communications, attitudes, and behaviours. The data collected was immediately added to the corresponding interview/focus group transcriptions in order to maintain accuracy, and was anonymised to protect participants’ identity and thus ensure the data confidentiality (McKechnie, 2008a).

Once the data collection phase had been completed, all the participants were contacted by e-mail to thank them for their collaboration and contributions, and to remind them that the research results would be emailed to them for review (Mitchell & Irvine, 2008; Mero-Jaffe, 2011).

5.2.6 Data collection in practice. The data were collected from six contact centres (four located in Edinburgh, one in Glasgow, and another one in Livingston) dealing with end-customers (B2C) and covering diverse sectors (i.e., financial services, utilities, technology, telecommunications, media, retailing, and technical support). Four of the contact centres were in-house operations, whereas the other two provided services to third parties. The size of the sites ranged from 19 to 900 seats, half of them large sites delivering a 24/7 service. Most contact centres handled inbound communications from customers except one (outbound) site focused exclusively on establishing contacts with current/potential customers on behalf of their clients.

Although interviews and focus groups were expected to be conducted with one manager and four to six agents (Franz, 2011; Krueger & Casey, 2015; Onwuegbuzie, Dickinson, Leech, & Zoran, 2009; Sagoe, 2012), respectively, two contact centres provided three managers to be interviewed altogether and in another site nine agents volunteered for the focus group, was agreed and used as an opportunity to gather more views on the topic. Further details on the participants and their corresponding contact centres are placed in Appendix D, pp. 264-265.

The sample size complied with the minimum number of participants required for a hermeneutical phenomenological research and a qualitative study to be considered acceptable (i.e., five and fifteen, respectively), and data saturation was also used as a guiding principle (Creswell, 2013; Gentles et al., 2015; Klenke, 2016; Mason, 2010; Sloan & Bowe, 2014).

The data collection involved individuals working at operational level, but it is necessary to provide a brief explanation regarding the terminology employed by the participants in order to avoid confusion. In most contact centres, there were two different hierarchical layers at operational level, comprised of:

- team leaders/coaches/managers, who were directly in charge of a group of agents; and
- managers, who assisted and coordinated team leaders/coaches/managers, and were responsible for a department (e.g., sales, complaints) or the whole floor. Their contact with agents varied substantially from site to site.

Other contact centres, in contrast, did not have such hierarchy in place, so agents referred accordingly to their superiors as either team leaders/managers or simply managers: i.e., different terms to designate individuals performing the same job. Figure 5.3 below illustrates both structures:

Figure 5.3: Hierarchical structures in contact centres at operational level



The researcher has maintained in the transcripts the terms used by the participants to acknowledge their distinction in those workplaces where both figures co-existed. The figure of the manager, when it was also present along with other intermediate managerial positions (i.e., team leaders, team coaches, and team managers), has also been incorporated into the analysis to provide an overall view of the leadership practices implemented in each contact centre at operational level. For clarity purposes, the only term used to present the interview excerpts in this chapter will be *manager*, regardless of the existing hierarchical positions in each contact centre.

5.3 Analysis, Findings, and Discussion

The present study aimed to explore how leadership was perceived and experienced by contact centres managers and agents in order to identify the leadership theories implemented at operational level in Scotland's contact centre industry.

It is necessary, however, to explain first how the data collected from interviews, focus groups, and observations were analysed in order to understand the process.

5.3.1 Application of IPA and NVivo. As discussed in the Methodology chapter, the data analysis was performed following an IPA and supported by NVivo software, which complements with IPA for its capacity for detailed qualitative analysis involving the management of multiple codes and themes from different cases (Gibbs, 2014).

Unlike other methods (e.g., thematic analysis), there is no standard approach for applying IPA (Cooper et al., 2012), other than being committed to a “creative process” (Smith et al., 2009, p. 184) that acknowledges “the researcher’s interactive and dynamic role” in the interpretation of interpretations (Wearden & Wearden, 2006, p. 98). Nevertheless, the data analysis in this research followed a seven-stage process based on Smith et al.’s (2009) framework (see Table 5.2 below), which has been further applied by Pietkiewicz & Smith (2012). On their qualitative research, they performed an IPA involving key features (i.e., exploration of individuals’ lived experiences, phenomenological [descriptive] and hermeneutic [interpretative] analysis, small and purposeful homogeneous sample, semi-structured interviews, inductive logic, idiographic perspective) that are also present in this study.

Table 5.2: Steps of Interpretative Phenomenological Analysis

Steps	Description
1. Reading and re-reading	<ul style="list-style-type: none"> • Repetitive reading of the transcript or listening to the recording that enables the researcher to ‘immerse’ into the data
2. Initial noting	<ul style="list-style-type: none"> • Making notes on the transcript at a basic exploratory level according to its descriptive, linguistic, and conceptual content(s)
3. Developing emerging themes	<ul style="list-style-type: none"> • Identifying links, interrelations, and patterns among exploratory notes and comments in order to develop emergent themes
4. Searching for connections among themes	<ul style="list-style-type: none"> • Looking for connections between emerging themes, grouping them together according to conceptual similarities, and allocating a descriptive label to each cluster
5. Moving to the next case	<ul style="list-style-type: none"> ▪ Even if the analysis follows the same process, each case should be treated individually to maintain IPA idiographic approach
6. Looking for patterns across cases	<ul style="list-style-type: none"> ▪ Identifying emerging themes across the entire set of transcripts ▪ Determining similarities and differences among themes, and how they complement each other
7. Writing up a narrative account	<ul style="list-style-type: none"> ▪ Description of each theme illustrated with relevant participants’ extracts from transcripts and complemented with the researcher’s analytical comments and interpretations

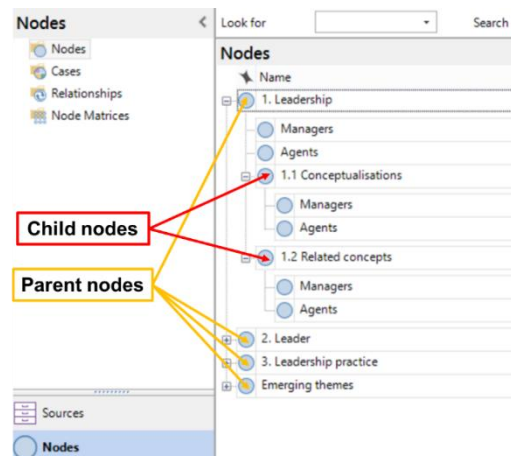
Note: Adapted from Smith, Flowers & Larkin (2009), pp. 79-117; Smith & Osborn (2008), pp. 66-78.

The analysis first required multiple readings of the transcripts to become familiar with the text (e.g., structure, richer sections, contradictions) and to gain some preliminary insights that enabled the researcher to enter participants’ world through an active engagement with the data. In this first step, reading was complemented with taking initial notes (step 2) that were linked to fragments (i.e., *coding* in qualitative terminology) based on their descriptive (e.g., keywords,

sentences, explanations for describing content), conceptual (e.g., particular meanings, such as existing tensions characterising managers-agents relationships, can trigger emergent understandings, such as inequality based on hierarchical structure), or linguistic (e.g., metaphors, tone, use of language) relevant content (Smith et al., 2009). This stage implied an analytical dialogue with the transcript that increased the researcher's understanding and generated more notes (or codes) (Biggerstaff & Thompson, 2008; Cooper *et al.*, 2012).

In order to move on to the next step, it was necessary to build a node structure in NVivo. Since it was known in advance the key broad topics subject to study included in the Interview Guide (i.e., Q1: leadership; Q2: leader; Q3: leadership practice), *parent* and *child nodes* (for main questions and sub-questions, respectively) were created accordingly before starting to code (Bazeley & Jackson, 2013; Bernauer et al., 2013). Folders for agents and managers were placed in each node to distinguish the sources of the feedback for every single (sub-) question in the Interview Guide. Finally, a further node was added to include the potential new themes emerging from the data analysis unrelated to the nodes described above (see Figure 5.4 below).

Figure 5.4: Structure of parent and child nodes in NVivo



Once a basic node structure was completed, relevant content from some of the sources (i.e., interviews and focus groups transcripts) was coded to the corresponding nodes. A code is “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” (Saldaña, 2011, p. 3). When a piece of data from the observation notes was related to coded content from an interview or

focus group (either to confirm or contradict it), the relevant word(s) or sentence(s) were highlighted and a note (i.e., *annotation* in NVivo terminology) was created linking directly the particular word(s) or sentence(s) to the data collected from the observations. Since the observation notes reflect the practical side of the phenomenon of study, they rely on the researcher's ability to be captured, and works as a complement to confirm or contradict the transcripts, they were placed in annotations rather than in folders because the former links directly and visually the two relevant pieces of data that unites them. That way, the three sources of data (i.e., interviews, focus groups, and observation notes) were integrated into the same node structure. Annotations were also used to highlight particular aspects observed by the researcher during the interviews and focus groups (e.g., voice intonation or body language on a particular subject) (see Appendix E, pp. 266-267 for examples). When the content of a fragment represented a new theme different from the existing nodes, a new *child node* was added to the structure and placed under the corresponding *parent node*; for instance, as the themes related to TFL (e.g., *individualised consideration*, *intellectual stimulation*) began to emerge during the analysis, a new *node* named TFL and its corresponding *child nodes* (i.e., sub-dimensions) were aggregated to the *parent node* Leader since TFL refers to a leader's style.

After all the material was coded from the transcripts and the observation notes, the researcher performed a more detailed revision of the coding following an iterative process, giving rise to additional codes for the same fragments that were (re)allocated to the right nodes and also helped to have a better understanding of the content. The final result depicted multiple excerpts representing references from different sources in each node. After establishing interrelationships and patterns between all codes and annotations, the researcher started developing emergent themes (see Table 5.3 below) in a cyclical process comprising the previous three steps that involved assigning a keyword or phrase that condensed the essential or shared meaning of several codes (Smith et al., 2009), given that Phenomenology facilitates a theme-based approach to analysis (Guest, MacQueen, & Namey, 2012). The researcher made sure that each theme was clearly represented in the transcript and captured the essence of participant's words, but also the researcher's interpretation (Biggerstaff & Thompson, 2008).

Table 5.3: Examples of coding and emerging themes

Nodes (<i>parent</i>)	Excerpts	Coding (<i>child nodes</i>)	Themes
Leadership	“It is more about guidance and support for the people that work for you since you all try to achieve the same goals, and to help them and guide them on how to achieve those goals” (Manager 6)	<ul style="list-style-type: none"> ▪ Guidance, support ▪ Goals 	<ul style="list-style-type: none"> ▪ Importance of supporting staff members ▪ Need to achieve a purpose and/or outcome
Leader	“You need to be an expert on the subject in order to gain that respect from other people. If you don’t have the knowledge or the expertise on a certain area and you are trying to lead someone, you will not gain that respect from them” (Manager 2)	<ul style="list-style-type: none"> ▪ Individual trait: expertise, knowledge, experience ▪ Gaining respect 	<ul style="list-style-type: none"> ▪ Need to have knowledge and experience: <ul style="list-style-type: none"> - to gain respect from team members; and - to be regarded as a leader ▪ Interrelationship between leadership-respect

Note: Interviews and focus groups transcripts, and non-participant observation notes.

That step actually denotes the manifestation of the hermeneutic cycle (Smith et al., 2009): as the original transcript underwent a reorganisation of the data based on emergent themes, the whole interview became a set of parts that eventually come together to form a *new* whole, highlighting the researcher's interpretative role in the process; thus, the meaning of a part was only understood in the context of the whole interview, whose meaning itself became clear with the accumulative meanings of individual parts (i.e., hermeneutic cycle) (Robinson & Kerr, 2015).

Then, a search for connections across themes based on abstract meaning (i.e., superordinate themes), similarities/differences, or contextual elements was performed to further arrange them into clusters and thus build a thematic hierarchical structure. Themes which did not fit into the emerging structure or have a weak evidential base were removed (Biggerstaff & Thompson, 2008; Smith et al., 2009).

This process was implemented again for other individual case analyses, making sure that the researcher was not influenced by notes/themes identified in previous cases. Once the entire set of transcripts was analysed, the researcher looked for patterns across cases, including superordinate themes, in order to identify the connections within the group and thus develop a deeper understanding of the phenomenon under investigation. Finally, the analysis was completed through the elaboration of a persuasive and comprehensive account of the phenomenon as experienced by participants, combining descriptions and interpretations with relevant transcripts excerpts as supporting evidence to ensure quality criteria (e.g., transparency, trustworthiness) throughout the entire process (Eatough & Smith, 2008; Larkin et al., 2006; Rodham et al., 2015; Smith, 1996; Smith et al., 2009; Storey, 2007).

That final step corresponds to the analysis that follows, which was organised according to the same structure of questions included in the Interview Guide (see Appendix C, p. 253) and replicated in NVivo.

The structure of the rest of the section will be based on the three key themes discussed in the Literature Review chapter: leadership, leader, and leadership practice.

5.3.2 Leadership. This section presents the main ideas that participants associated to the notion of leadership, the views concerning its emergence in the workplace, and its relationship with other concepts.

5.3.2.1 Main ideas. Participants provided diverse perceptions about the notion of leadership which can be condensed in four main dimensions that will be examined below:

Influence. Some managers and agents perceived leadership as exercising an influence over others on their day-to-day work (e.g., to comply with service standards), regarding such an influence as the most suitable way to achieve the objectives.

“I’d say leadership is about being able to influence and motivate other people to achieve a certain goal.” (Agent 3)

“It is mostly influencing and guiding other people.” (Agent 10)

The understanding of leadership as an influence process was explained by the fact that both agents and managers find influence essential in order to continuously deal with colleagues within the context of their regular interactions at work (e.g., organising tasks, discussing issues, changing procedures, or solving problems). In doing so, contact centre staff perceive leadership as an “interpersonal influence” (Tannenbaum et al., 1961, p. 2), a “relationship influence” (Rost, 1991, p. 102), or a “interactive influence process among individuals” (Pearce et al., 2008, p. 622) that emphasises the social context where the leadership process takes place, thus highlighting leadership as a social interactive activity rather than necessarily as an individual possession or characteristic (Bass, 1990a; Crevani et al., 2010; Hosking, 2006; Northouse, 2015).

The identification of influence as one of the dimensions of the leadership concept coincides with most contemporary definitions of the concept (e.g., Haslam et al., 2011; Hollander, 2013; Pearce et al., 2008; Yukl, 2013), including the one adopted in this research by Northouse (2015) (see section 3.2.1, p. 47).

The need for a goal, a purpose, or an outcome. Widely highlighted by most participants, especially agents, was the fact that leadership, in practical terms, had to generate an outcome, pursue a goal, or have a purpose (e.g., maintaining/improving performance or service standards).

“It [leadership] is more like just having a vision, and just being able to manage people and influence them to basically make the right decision and achieve the right result.” (Agent 3)

The same idea was emphasised in different terms by another agent:

“Leadership is the ability for someone to lead a group of people in order to achieve a goal or an aim.” (Agent 17)

The emphasis on the idea of leadership being necessarily attached to goals/outcomes seems to be directly related to the target-oriented and performance maximisation culture predominant in contact centres that requires to be fully assimilated by staff at all levels (Bain et al., 2002; Banks & Roodt, 2011; Dean & Rainnie, 2009; McAdam et al., 2009; Robinson & Morley, 2006; Taylor et al., 2002). In this regard, the need for maintaining/improving performance or service standards highlights the practical approach adopted in current contact centre organisations. Those key goals/targets are conveniently emphasised through training and working practices to ensure that staff members assimilate that culture and comply with its guidelines. In fact, training at some contact centres is conceived as a control-based practice that involves monitoring employees' performance, thus encouraging implicitly the achievement of results (Callaghan & Thompson, 2002; Garavan et al., 2008; Holman & Woods, 2002; Holman et al., 2007).

The accomplishment of goals or the need for outcomes associated to the idea of leadership also matches the corresponding dimension in the definition of leadership stated by Northouse (2015) and endorsed in this research (see section 3.2.1, p. 47).

Establishing working relationships. In addition to exercising an influence and generating an outcome, most participants related the idea of leadership to building a “*professional connection*” or “*rapport*” with others (Managers 5 and 10,

respectively) focused on supporting staff members (e.g., guiding, coaching, developing skills and knowledge, motivating) and rooted in the existence of mutual trust and respect.

“It is about that working relationship with the people who are reporting to you. It is not about telling people what to do [...] It is more about guidance and support for the people that work for you”. (Manager 6)

Another manager’s view:

“It is really about supporting the members of staff and helping them achieve their targets and their goals, and developing and coaching them in order to bring their best potential. It is also about a two-way respect: they respect me as the leader and I respect them as agents”. (Manager 1)

By building (good) working relationships with staff members, particularly agents, managers can develop “*an understanding of each other*” (Manager 6) that contributes to creating a solid bond among them based on trust and respect (Jenkins & Delbridge, 2014). That connection supports the findings of some contact centres studies unrelated to leadership (Akroyd et al., 2006; Hannif et al., 2008; Siong et al., 2006) that showed that a culture of managers’ support facilitates the development of relationships with co-workers.

The roles of trust and respect in leadership have been widely acknowledged in past and more recent studies (Bass, 1990a; Braun et al., 2013; Carmeli et al., 2012; Day et al., 2009, 2010; Seashore et al., 2009; Wallace, 2002). By building trust and showing mutual respect for each other, all team members were (symbolically) placed at an equal level and agents would be more likely to follow the manager and regard her/him as a leader “*without actually realising that they are doing it*” (Manager 5).

Perhaps, most importantly, the existence of trust, respect, and managerial support relate to the high-quality relationships characteristic of the Leader-Member Exchange Theory (LMX) that are actively nurtured by agents and managers (Dulebohn et al., 2012; Graen, 1976; Howell & Hall-Merenda, 1999). High-quality relationships between leaders and followers generate more positive outcomes than low-quality relationships, which lack those patterns of behaviour

and prioritise, instead, rewards, feedback, and recognition for accomplishments (Anand et al., 2011; Graen & Uhl-Bien, 1995; Uhl-Bien et al., 2012). In consequence, the existence of LMX relationships between managers and agents may indicate an aim to increase employee well-being in order to achieve further organisational outcomes, like the ones cited in this research (e.g., job satisfaction, commitment, satisfaction with leader).

Based on the participants' feedback, the process leading to high-quality relationships follows the same pattern as Dienesch & Liden's (1986) model (see Chapter 3, p. 88), whereby leaders increase their trust and support to followers according to their behaviours and performance in the implementation of delegated tasks. In this case, contact centre leaders did not bypass that step so the developmental process followed the regular social exchanges between the leader and staff members in order to build high-quality relationships over time. That way, leaders could clearly identify the individuals whom they could trust the most for performing some leadership tasks/responsibilities, a practice which is consistent with the data provided by both groups.

Interestingly, the feedback revealed the existence of *in-group* and *out-group* structures within the teams, but showed only a preference for the *in-group* structure, which can be noticed in the following quotes:

"You work with them [agents] and you cannot give more importance to some people instead of others." (Agent 12)

"Some people try to lead people by pampering them [some agents] and treating them differently from everybody else, and they are so busy trying to keep one person happy that they lost the other people within the team." (Manager 5)

This suggests that LMX relationships, despite being formed through dyads, may only become meaningful when they have a conjoint impact at group level, indicating that the whole team is (and needs to be in order to achieve such impact) an *in-group* structure. That achievement would require treating equally each team member to avoid internal conflicts; that way, as no team members are excluded, each team can run smoothly and maximise its potential. Such dynamic relates to LMX studies (e.g., Bolino & Turnley, 2009; Chen et al., 2014) that reported the

dangers of discriminating individuals in low LMX relationships (e.g., negative attitudes, grievance, lower organisational commitment, higher turnover intentions), which denotes that contact centre managers tend to build high LMX relationships with all team members, treating their entire teams as *in-group* structures to prevent unwanted situations that could result “detrimental to the overall group” (Anand et al., 2011, p. 313).

The existence of LMX relationships between agents and managers acquires a greater relevance because of the broad implementation of TFL by managers (which will be shown below). That concomitance supports the view that LMX relationships serve as a platform that facilitates the emergence of TFL, so agents in high-quality LMX relationships are more willing to accept the influence of transformational leaders, echoing the findings by Piccolo & Colquitt (2006). Furthermore, they provide support for the idea that “LMX theory can be integrated with transformational leadership theory to further understand leaders’ influence on individual outcomes” (Anand et al., 2011, p. 318), showing that the individual orientation of LMX can be accommodated within the aim for collective effort fostered by TFL (e.g., Tse et al., 2010; Wang et al., 2005).

Therefore, building working relationships within the workplace seems to function as a platform that may further facilitate the capacity to exert an influence over others. Overall, establishing working relationships represents a new dimension that extends the contemporary notion of leadership outlined by Northouse (2015) and adopted in this research (see section 3.2.1, p. 47).

Managing the group. It was also emphasised as a key aspect of leadership the capacity to build and manage a group, which involved delegating tasks, meeting targets/goals, satisfying the group’s needs, solving conflicts, or keeping cohesion in order to engage staff members and thus ensure performance standards.

Leadership is also about someone who can mould and build a team [...] In this contact centre, we all work in teams. If you get a leader who is not really working well and does not get a team to bond, your performance can suffer; that kind of chemistry is not there [...] Delegation is quite an important part; leadership can quickly turn into dictatorship if it is not run correctly and is

not delegated and shared with your team by giving [internal leadership roles]. (Agent 30)

Had the managers not possessed “*that strong foundation*” (Manager 10), the overall team performance might decrease and targets/expectations might not be met. In this regard, it became clear that managers kept team members involved in leadership practice to reach the performance standards set for the group.

The importance attributed to managing the group seems to respond to the way that staff is organised in contact centres, which is strongly supported by the data collected through the observation sessions as the researcher verified *in situ* the existence of teams and the constant presence of the managers alongside the team members to organise tasks and to provide support. Managers and agents formed teams (e.g., for daily work, problem-solving, quality improvement), which were the working units where all the operations were performed and where staff mostly related to and interacted with each other (Dean & Rainnie, 2009; Holman et al., 2007; McClelland et al., 2014).

Despite the individual (electronic) monitoring, the activity was oriented towards team performance and meeting the group targets, so a strong sense of teamwork and collaboration was usually fostered by the management. In fact, teams operated as self-managed units but also interconnected in such a way (e.g., face-to-face, electronically, cross-team collaborations) that they formed a network across the contact centre that enabled the flow of information (Armistead et al., 2002; McClelland et al., 2014; van den Broek et al., 2008). The existence of teams also facilitated task delegation to agents to ensure that the work was completed, which also contributed to their professional development (Garavan et al., 2008). In conclusion, managing the group comes to highlight the wider role played by teams as activity hubs in contact centres in terms of performing tasks, developing staff, and sharing information; but also in providing a social structure for interactions highly valued by team members.

The capacity of managing a group/team has been stated implicitly or explicitly in past leadership accounts (e.g., Fiedler, 1967; Hemphill, 1949; Kouzes & Posner, 1987; Stogdill, 1950), but barely mentioned in more recent definitions. The account of leadership embraced in this study (Northouse, 2015) includes a *team*

context dimension that alludes to the collective working environment in which the leadership phenomenon emerges, which is different from the capacity of managing a group expected/required from a leader. Therefore, managing the group will be considered an addition to the current understanding of the definition of leadership by Northouse (2015).

In conclusion, the data analysis (1) has found support for the *influence* and *goal* dimensions; and (2) has identified two new dimensions (i.e., establishing working relationships, and managing the group) that can be incorporated into the definition of leadership embraced in this research (Northouse, 2015) and specified in section 3.2.1, p. 47.

5.3.2.2 Conceptualisations. Participants believed that leadership was an innate quality that could also be developed, and it emerged naturally but could not be allocated. Those ways of manifesting itself complemented each other. If leadership was only an innate quality arisen naturally, it would “*never [be] enough*” (Agent 12); whereas if it was based only on development, “*you will miss out*” (Manager 3) and it would not be possible “*to bring out its full potential*” (Manager 6).

“Even if it comes naturally, it can be developed; but, when that role is allocated, it will never work.” (Agent 25)

I do think that is something that can be developed with practice [...] For me, there are definitely natural leaders out there, some people on the floor, but I definitely think that it is something that can be developed within your range of skills or expertise. (Manager 2)

Other participants emphasised the importance of full development by means of training and support, even if an individual did not possess an inborn capacity/talent or trait to be a leader.

You can learn how to talk, how to think, how to control your emotions, how to behave, and how to guide others. Those are skills, and you can learn skills. [...] You can naturally not be a leader, but you can learn how to act like one and learn how to be one. (Agent 15)

At the moment, I am just developing my skills, learning about the different areas within the business in order to rack up my skills, so I could be a good leader. You may not be a natural born leader, but if you have the skills and support behind you, you can grow to be one. (Agent 20)

The higher importance given to development in the emergence of leadership may lie in the fact that staff have access to multiple training and leadership development programmes available at contact centres that allow them to acquire the necessary knowledge and skills to exercise effectively leadership (Akroyd et al., 2006; Garavan et al., 2008; Holman et al., 2007; Sutherland et al., 2015). In consequence, leadership is perceived mostly as a *process* because it can be learnt and developed in a particular context, but also as a property based on *traits* or innate qualities. Both views are reflected in the framework proposed by Northouse (2015) (see section 3.2.1, p. 47); however, unlike that model, the participants' feedback indicates that both views complement rather than conflict with each other.

On the other hand, the formal allocation of the leadership role (i.e., *assigned* position) is rejected to explain the emergence of leadership; instead, the evidence supports the idea that leadership is derived from a positive response towards an individual's behaviour, depicting leadership as an *emergent* phenomenon rather than as a formally allocated role (e.g., Gronn, 2000; Crevani et al., 2010; Drath et al., 2008). Similarly, both views are conceptualised as opposite in Northouse's (2015) framework, but the collected data only supports leadership as an emergent phenomenon.

5.3.2.3 Related concepts: authority, coercion, control, persuasion, or power? Most participants acknowledged that leadership was based on “a combination” (Agents 2, 13, 17, 18; Managers 2, 3, 6, 7) of four forms of influence based on “*getting the right balance*” (Manager 5). Specifically, most staff members coincided in signalling persuasion (Hollander, 1985; Northouse, 2015) as the most important component of leadership, which needed to be complemented with authority, power, and/or control.

I think that in leadership you need to have control and power, but certainly persuasion over the people you are managing. If you didn't have the final

say and where it [work direction] goes, it would be just a circle; it wouldn't go anywhere. You have to get the maximum authority to make those decisions, but I would say that, ideally, persuasion is the one related to leadership because I suppose that what I would like to do is to let them [agents] come to those decisions by themselves; if they buy in there, they will more likely get results. (Manager 8)

Leadership may have been perceived as an exercise of influence based mostly on persuasion because it was more effective than “*imposing your own idea*” (Agent 26) or “*being dictatorial*” (Manager 10), which could be more closely related to authority, power, coercion, or control. Unlike those forms, persuasion does not have negative connotations (Western, 2008b), and that would also explain its preference by staff members. That approach reinforces the idea that “*persuasion in this kind of business is more important than power or authority*” (Manager 3).

Basically, managers tried to exert a leadership influence on their team members focused on persuasion by applying a communication strategy based on dialogue and a mutual understanding, and avoiding being “*autocratic*” (Manager 3), critical, or confrontational to make sure that “*you get the best out of them*” (Manager 1). Some managers provided insightful examples of how they implemented their persuasion-based strategies in practice.

If someone says 'just do this because I am your boss or because I told you', I don't think that you will get much buy-in from someone; whereas, if you, as [manager's name] said, give the people below you that kind of scope and explain why you are doing something, you are essentially persuading them to make those decisions. (Manager 4)

You may have someone who does something one way and they think that's the right way to do it [...] so, rather than saying 'it's wrong, you are not doing it properly', it is about having a conversation and understanding why they are doing it that way [...] When you discuss it with someone and they understand why you are asking them to do it, they will be comfy doing it. (Manager 5)

There are two potential reasons that may explain why participants perceived leadership as a combination of persuasion, authority, power, and/or control. First, in contrast to the interrelations and conceptual overlapping expressed in the literature (Follett, 1941; Grint, 2005; Hollander, 1985, 2013; Western, 2008b), participants regarded each concept on an individual basis. Taking into account some of the inherent characteristics of contact centres working environments (e.g., an organisational culture dominated by performance maximisation, high workload, and short-term targets), both managers and agents may have concluded that the handling of the daily work at contact centres required a leadership capacity that did not only involve persuasion but also power, control, and an “*invisible authority*” (Agent 13) to be able to meet the demands of any working situation. Such combination would ensure that the regular tasks would be performed effectively and the goals would be fully attained.

Therefore, participants may have considered the need to combine those forms effectively in order to achieve a certain effect that increased the overall leadership capacity. In this sense, the evidence suggests that, depending on the task at hand or its intended purpose, the leader’s style, and the individuals towards whom they were directed, the resulting combinations varied accordingly in each organisation in order to gain the full commitment of staff members and thus ensure the smooth running of the contact centre. Such combinations were regarded as the most effective ways to make agents “*buy in*” (Managers 8, 10) and thus avoid their “*resistance*” (Manager 5) and obtain their collaboration in order to achieve goals and generate outcomes:

“There is a kind of set level that you are aiming for every call and they [team leaders] try to persuade you to meet those standards [...] You have to influence that with a bit of authority.” (Agent 1)

“It is about persuasion and using power to get things done; for example, team leader tasks, presentations, escalations...” (Agent 18)

Second, participants seemed to have considered that the use of power, control, and especially authority could not always be perceived as “*negative terms*” (Manager 4) of leadership in order to justify their application along with persuasion; for example, a leader can be authoritative “*but in a nice way, without*

demeaning people" (Manager 5), which would contradict somehow the view that those forms have negative connotations (Western, 2008b). The reason behind this finding might be that those forms are useful in certain circumstances: to provide a sense of direction for the team and the business (Agent 21; Managers 2, 5, 6, 8), to maintain standards (Agent 3), to deal with uncertainty or challenging situations (Agents 22, 23, 26), or to prevent agents' misbehaviour (Agent 26).

Authority, when it is deserved and well executed, is a good thing, not a bad thing [...] If you are my leader, and I am under your authority and I am happy with you because you are making the right decisions and taking the right actions for the group and for me, you are benefiting my life and I am happy to work for you and the company. (Agent 16)

Coercion was rejected as part of leadership, to the extent that most participants did not even mention it. Coercion was perceived as a resource used by someone who "*failed as a leader*" (Agent 24) and as an idea opposed to "*good leadership*" (Agent 26) because staff members were intimidated (Haslam et al., 2011). Such situation resulted in a lack of support towards the leader or of commitment towards the job, which may explain the general indifference shown by staff members towards coercion.

In sum, leadership in contact centres is not based on one single form of influence (i.e., persuasion); it also requires varying levels of authority, power, and control (Follet, 1995; Grint, 2005; Gordon, 2011; Heifetz, 2011; Hollander, 1985; Western, 2008; Yukl, 2013) in certain circumstances to be exercised effectively. This finding extends the dimension of leadership – i.e., influence based on persuasion – included in the definition by Northouse (2015) by adding other forms of influence such as authority, power, and control.

Therefore, and based on the discussion above, it is possible to configurate a new notion of leadership (see Table 5.4 below) that adds two dimensions (i.e., team management, building working relationships) to and extends another one (i.e., influence based on persuasion) in the definition of leadership by Northouse (2015) followed in this research (see section 3.2.1, pp. 47-48).

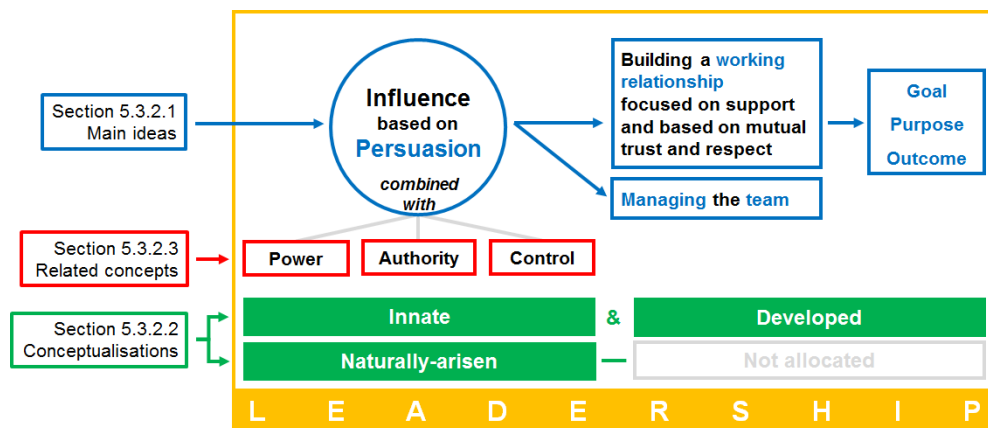
Table 5.4: Dimensions of the leadership definition (equivalent in green, different in red)

Definition	Dimensions			
Adopted in this research (Northouse, 2015)	Influence based on Persuasion	Goal Achievement	Team Context	
Found in this research	Influence based on Persuasion...	Goal Achievement	Team Management	Building working relationships
	...combined with Authority, Control, and Power			

Taking into account that those dimensions are derived from the data provided exclusively by contact centre staff, it can be argued that this new definition of leadership is context-specific and has a practical approach because it includes the necessary tools to exert effectively leadership in a contact centre environment.

5.3.2.4 Summary. The full notion of leadership found in this research is based on the findings of sections 5.3.2.1, 5.3.2.2, and 5.3.2.3, and reflected graphically in Figure 5.5 below.

Figure 5.5: Perceptions of leadership in contact centres



Basically, leadership is comprised of several forms of influence, of which persuasion is the most important one. The exercise of leadership requires persuasion to be combined (when necessary) with authority, power, and/or control to different extents in order to maximise its influential capacity. Such influence is complemented with building relationships at work and managing a team, which turned out to be paramount in the day-to-day work and emerged as

key dimensions of the definition. Finally, the exercise of leadership must necessarily be associated to a goal, a purpose, or an outcome. Those ideas were previously summarised in Table 5.4 above to illustrate the differences between the dimensions comprising the definition of leadership by Northouse (2015) adopted for this study and the new dimensions emerged from the data analysis.

In addition, leadership is considered to be a quality innate to individuals that can also be further developed through proper training and support; or it can be fully developed, even without the need of holding intrinsically natural qualities. Finally, leadership can only emerge naturally and it is not acknowledged as a quality that should be allocated.

5.3.3 Leader. This section will first deal with the individual attributes and competences of a leader to then focus on the differences that emerged from the data between leaders and managers.

5.3.3.1 Attributes and competences. The feedback revealed a set of qualities, both natural and developed, that allows to build a leader's profile. Those qualities, comprised of attributes and competences, could actually be regarded as the essential characteristics for a leader to be considered as such in a contact centre environment, but also as the key requirements to deal with the daily work and meet the team members' expectations.

Attributes. The attributes identified in the data were grouped into three sets:

- *Charisma, confidence, and attitude.* Leaders who possessed charisma drew people towards them and were “*more effective as leaders*” (Agent 2). Confidence was clearly portrayed as a characteristic that enhanced an individual's capacity to put into practice her/his skills into a leadership role, but equally inhibited it if the individual did not have enough of it. Thus, confident individuals seemed to have “*a natural quality to lead people*” (Manager 8); whereas individuals who lacked confidence needed “*to take a step back*” (Agent 22). Similarly, some participants considered that leaders needed to have an attitude that involved a willingness to change or to take on difficult situations (Agent 2, Manager 2).

“Charisma is definitely something you can’t learn. You still can do it effectively, but it is possible that you will be perceived in a different way.”
(Agent 10)

“You’ll have twenty people looking at you and, if you are unsure about something, it can be daunting because you can lose your respect.”
(Manager 4)

“You need to have a little of a natural instinct or a willingness to take on difficult situations; that’s your natural development on becoming a good leader.” (Manager 2)

Charisma, confidence, and attitude are ‘usual suspects’ in any list of leadership traits (Hoffman et al., 2011; Judge et al., 2002, 2009; Yukl, 2010; Zaccaro et al., 2004). Charismatic leaders usually inspire self-confidence and their attitude (e.g., to take on difficult situations) is praised, so they tend to attract others from whom they gain trust and respect (Bass, 1985, 1990a). In addition, charisma holds *referent* power based on the identification with the leader (French & Raven, 1959). Although they may not be apparent straightaway but certainly perceived over time, those three traits were highly valued by participants and considered to be inherent to a leader’s personality. This implies that agents may feel more identified with charismatic and confident leaders who have the right attitude and, in turn, they are more willing to trust and respect them.

- *Open-minded.* Being open-minded was associated to (1) the capacity to take into account everybody’s opinions, and to (2) managing the group diversity by applying different working methods. Agents, in particular, valued a leader’s capacity to change her/his views/decisions on a particular matter after having listened to their opinions and concerns over it, which contributed to the effective management of the group and to build a good relationship with the team members.

A good leader should also listen to the collective opinion and then adjust her/his way of action based on the opinion from her/his agents [...] A good leader has to listen to in order to make sure that she/he is listened to because, that way, you create that kind of bond between the team leader and the agents. (Agent 9)

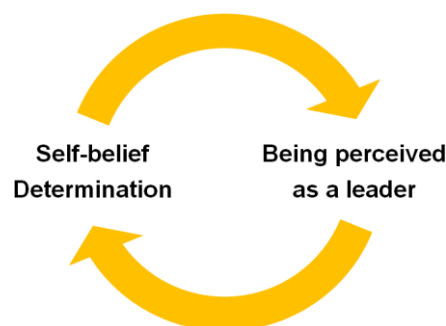
This approach matches the *Openness* component of the Five-Factor model that involves, for instance, being receptive to new ideas and understandings (e.g., diverse opinions and approaches) or showing flexible attitudes (Digman, 1990; Goldberg, 1990; McRae & Costa, 1999). Thus, it could be argued that staff prefer an open-minded leader who appreciates different ideas and values their feedback, rather than someone who ignores others' suggestions.

- *Self-belief and determination.* Both groups, particularly agents, explained that being a leader was an individual choice and “*starts with yourself*” (Manager 3) as a first step in the process. If you did not have a “*desire*” (Agents 26, 30) to develop yourself to take on that role nor “*believe yourself*” (Agent 2) that you were or you could become a leader, an individual would not be regarded as such by the rest of the team members, who will not be willing to help her/him.

“You have to recognise yourself in that position, as well, so that gives you the confidence to deliver other things to people [...] A lot of it is realising yourself and believe that you can do it.” (Agent 5)

That process actually delineates a dynamic that was described as “*symbiotic*” (Agent 2) because of the interdependence between having self-belief and/or determination and being perceived as a leader: both actions take place in a cyclical fashion whereby the former leads to the latter, and vice-versa, reinforcing each other (see Figure 5.6 below).

Figure 5.6: Relationship between self-belief/determination and being perceived as a leader



The fact that self-belief and determination have been especially emphasised by agents is not casual since they also shape the charismatic profile of transformational leaders (discussed further below), which suggests that agents

may have cited those qualities because they are key attributes that they admire in a leader. It also gives rise to one particular assumption: agents do not like indecision at the workplace. In a highly dynamic environment where the work pace is relentless, stress reaches high levels, and staff coordination is paramount, leaders need to make quick decisions without hesitation and ensure the smooth running of operations. If an individual does not regard herself/himself as a leader or does not have the proper determination to think and behave as one, agents are likely to notice it and interpret it as a *weakness* in those working conditions. In consequence, they might start experiencing doubts about the leadership capacity of the person in charge or they are dependent on to perform their job. As a result, agents may not perceive their superior as a leader.

The relationship depicted above in Figure 5.6 is consistent with the theory since self-belief and determination are among the attributes identified by major trait reviews that characterise a leader (Hogan & Kaiser, 2005; Kirkpatrick & Locke, 1991; Northouse, 1997; Stogdill, 1974) and, therefore, to be perceived as such in contact centres.

Competences. The competences that stemmed from the data were grouped into five sets:

- *Knowledge and experience.* A leader needed to have a sound knowledge in certain areas of the business, so staff members would acknowledge that she/he “*knows what [she/he] is talking about*” (Agent 1) and the leader would be in a position “*to gain that respect from people*” (Manager 2).

If someone gives good advice or knows a lot about a task, then they could be seen as leaders because it is someone you would go to [...] I think everyone has acted like a leader at some point because we all ask each other questions and seek advice from our peers and support each other.
(Agent 20)

Likewise, experience was portrayed as a key requirement to become a leader and as part of her/his development. Experienced leaders did not only tend to improve in their jobs as they accumulated more experience; but could also help agents because they had “*an understanding of your position*” (Agent 30). The

importance assigned to having knowledge and experience was such that an individual possessing other traits to be a leader might not succeed if she/he lacked these two qualities.

“If you go for a leadership job [at the contact centre] and someone tells you that you have the traits to be leader but you have no experience or knowledge, then you might set yourself up to fail.” (Agent 20)

Both knowledge and experience constitute two key skills for an individual who intends to lead (DeRue et al., 2011; Hoffman et al., 2011; Yukl, 2010). Beyond their evident benefits (i.e., work improvements, helping others), the importance of knowledge and experience reside in their capacity to gain the respect from staff members, which, in turn, may potentially help to build positive working relationships. That last claim is actually supported by the notion of leadership shown above, in which support and respect play central roles in developing strong working relationships (Hannif et al., 2008; Anand et al., 2011).

- *Social and communication skills.* Having social and communication skills were broadly discussed by most participants as two characteristics intrinsically interrelated and extremely important attached to a leader. By adopting a people-oriented approach underpinned by regular interactions and effective communication with others, an individual was more likely to be perceived as a leader and would be able to work more easily with staff members.

If you don't care about other people, you can't be a leader [...] The way you interact with people dictates whether or not you are a leader. If you get on well with people, if they are willing to listen to what you have to say, then both of you can come to a decision. (Agent 2)

The capacity for caring about other people and for being able to show “*empathy*” helped leaders to gain “*an understanding*” of the individuals that they were leading, both at work and in personal terms, and to engage with them “*on an equal basis*” (Agent 24; Manager 7). In this sense, the way to express and explain intentions and expectations, including the way to raise staff motivation, i.e., through “*constructive criticism or 'getting hammered'*” (Agent 30) becomes critical, which highlights the importance of communication and language for

leaders to connect with their team members both as a group and individually (Ackroyd et al., 2006; Spillane et al., 2004; Yukl, 2013).

“The way a leader speaks to people [agents] is as important as the way agents speak to the customer.” (Agent 5)

Another agent in a different contact centre explains it more clearly:

“You need to get people on board all the time, and you cannot communicate in an imposing or dogmatic way: ‘this is how is going to be’. It is not going to work; not in this kind of environment.” (Agent 26)

The participants acknowledged the need for leaders to properly articulate what they needed to communicate (i.e., one-way communication); but leaders were also required to listen to. This two-way communication approach coincides with French & Raven’s (1957) *informational* power, whereby leaders persuade others by using logical arguments and/or clear information, which involves a dialogue rather than coercion or authority. In doing so, their power was grounded on co-action (i.e., *power-with*) rather than coercion (i.e., *power-over*) since the former consists of a reciprocal influence that leads to effective leadership given that it relies on the combined capacity of the group (Follett, 1927), which is also consistent with the influence based on persuasion found as an integral part of the notion of leadership (Northouse, 2015). Since there is also evidence, as shown above, of *referent* (i.e., identification with the leader based on *charisma*, *confidence*, and *attitude*) and *expertise* power (i.e., based on *knowledge* and *experience*), contact centres leaders held up to three forms of personal power to deal with others (Elias, 2008; Raven, 2008). *Reward*, *coercive*, and *legitimate* power, instead, turned out not to be relevant in a contact centre environment. Following French & Raven’s (1957) framework (see pp. 49-50), this indicates that a leader’s capacity of influence resides on her/his *personal* (i.e., *referent*, *expertise*, *informational*) rather on the *organisational* power (i.e., *reward*, *coercive*, *legitimate*).

If the leader lacks social and communication skills, staff members would not respond as expected, causing in turn a negative impact on the daily work: business decisions would not be carried out *“by no one or not particularly well”* (Manager 4); it would be *“very hard to influence anyone”* (Agent 30); and agents

would not “*want to speak to them [leaders] or ask for help*” (Agent 28). The examples below describe two experiences from an agent’s and a manager’s perspective that show the importance of having both interpersonal and communication skills, highlighting the need for empathy and for smooth interactions with staff members.

One day I was late, so he [the manager] sent me to [internal department] and I got really upset [...] I had a reason: my kid and I were ill. I talked to him for half an hour, and his face was like a puppet: it never changed a millimetre [...] I felt that I was talking to a wall. When he told me to go to the [internal department], I’d wish that he had told me that as a human, not as a machine. (Agent 8)

The manager’s example involves an agent:

Someone in my team [an agent] has the potential to be amazing. He has really high energy, can get people on board and do really well, and strive for fantastic results 99.9% of the time [...] The perception of my team of him now is that he could be great; but, actually, the reality is that 0.1% that gets to them is how he interacts with other people, and personal feelings [from other agents] get in his way. (Manager 9)

Social and communication skills echo the *consideration* and *employee-centered* dimensions from Ohio and Michigan studies, respectively, focused on communication and relationship-oriented behaviours with subordinates (Fleishman, 1961; Kahn & Katz, 1952). Their presence as individual skills has also been identified variously as part of leaders’ key attributes (e.g., ability to handle people, interpersonal skills, communication skills, sociability, extraversion) (Hoffman et al., 2011; Hogan & Kaiser, 2005; Yukl, 2010), which comes to corroborate the importance for a leader to know how to deal with others from a relational and communicational standpoint.

- *Adaptation capacity and flexibility.* Surprisingly, taking into account the rapidly-changing environment of contact centres and the diversity of the workforce, few participants mentioned the capacity for adaptation and the need for being flexible as key requirements for a leader. Nevertheless, it should be

noted the distinction: adaptation capacity was used in rapidly-changing situations (e.g., sudden increase in customers' waiting queue); whereas flexibility was required when dealing with staff members (e.g., different approaches for motivation) in order "to get the best out of people" (Agent 23).

A leader is somebody that knows when to bend, to take the shape of the team and the person you are dealing with. There are some people who can do things their way or it is not done at all, and you have to mould yourself to their standards [...] Leadership is also about understanding the rules and being flexible. (Agent 2)

Perhaps, at a deeper level, what adaptation and flexibility denoted was the need for change and the willingness to start avoiding standardised approaches to manage different people and situations. In other words, "*you cannot always be rigid*" (Manager 5) and staff members might be requesting from managers a capacity for a better understanding of the working environment and, most importantly, of the people in it, acknowledging that there might be multiple solutions rather than usually one to the issues that both may generate. Therefore, participants seemed to point out two essential but on the other hand overlooked characteristics that leaders should be able to demonstrate (Hoffman et al., 2011; Kirkpatrick and Locke, 1991; Zaccaro, 2001) in order to handle staff and to face successfully the unpredicted and shifting working environment of contact centres.

- *Provision of support and motivation.* Leaders needed to provide support to their staff members (e.g., constructive feedback, development, personal goals) and have the capacity to motivate them. For agents, it worked as a safety device to know that their manager was close and would "*be able to support me*" (Agent 19) at any time – a practice corroborated through the observations in the field. Likewise, leaders were required to motivate staff members, which had an impact on the overall team and made it "*really work*" (Agent 8).

"You know that there is someone right there who is going to take an interest in you and really going to help you." (Agent 4)

The provision of support and motivation did not only concern agents. Managers at operational level also acknowledged the need for the same kind of support and motivation from their superiors to “*make your life a little bit easier*” (Manager 9).

The presence of support and motivation has been emphasised by the contact centre literature (Akroyd et al., 2006; Armistead et al., 2002; Garavan et al., 2008) and is consistent with the notion of leadership emerged from this research (see section 5.3.2.1). Leaders may be supporting and motivating team members as part of their duties to improve their work while also contributing to building good working relationships, which was identified as one of the components in the definition of leadership. A similar approach was reported by Dean & Rainnie (2009), who found that managers’ support contributed to improve the performance and service quality of agents, who considered their relationships with their managers “the most important factor that facilitates work with customers” (p. 331).

- *Unafraid of making decisions.* To a much lesser extent than other skills mentioned above, it was noted that leaders should be able to make “*good business decisions*” (Manager 4) rather than remain passive and assume the potential negative consequences of that indecision.

Sometimes, what is good for the person is actually to be laid off the company and not to stay, and the leader has to realise that that is the best option for that person rather than thinking the best way to keep that person within the company [...] That kind of hard decisions are often the hardest ones to do.
(Agent 15)

The exigency “*to make hard decisions and execute difficult actions*” (Agent 15) seemed to be related to what was mentioned further above: agents do not like indecision at the workplace because, among other things, it has a negative impact on their work(pace). Furthermore, what also seemed to emerge from the participants’ answers was that self-assured decision-making was appreciated and actually expected from a leader (Hoffman et al., 2011; Stogdill, 1974), and might also contribute to ensuring team cohesion because it made staff “*buy-in*” (Manager 4); whilst indecision, in contrast, caused stagnation.

Having identified the competences that describe a contact centre leader, it is possible to relate those to several skills included in competency models displayed in section 3.3.1, pp. 52-55 (see Table 5.5 below):

Table 5.5: Competency models related to the competences found in this research

Competences found in this research	Competency Models (Skills/sub-skills)
Knowledge and experience	Day et al. (2014) Intrapersonal (e.g., experience and learning skills)
	Mumford et al. (2007) Cognitive (e.g., active learning)
	Van Velsor & McCauley (2004) Self-management (e.g., ability to learn)
	Yukl (2013) Technical (e.g., knowledge about methods and processes, products and services, organisation)
Social and communication skills	Bennis and Thomas (2002) Ability to engage with others in shared meaning
	Day et al. (2014) Interpersonal characteristics (e.g., social mechanisms)
	Mumford et al. (2007) Cognitive (e.g., speaking, active listening) Interpersonal (e.g., social perceptiveness, persuasion)
	Van Velsor & McCauley (2004) Social (e.g., ability to build and maintain relationships, communication skills)
	Yukl (2013) Interpersonal (e.g., establishing relationships, communication skills)
	Zaccaro et al. (2013) Social (e.g., ability to deal with different kinds of people, communication skills)
Adaptation capacity and flexibility	Bennis and Thomas (2002) Adaptive capacity to different situations
	Zaccaro et al. (2013) Cognitive (e.g., flexibility)
Provision of support and motivation	Storey (2004) Ability to deliver change (e.g., providing support for followers through training and development in order to empower them to take decisions)
	Van Velsor & McCauley (2004) Social (e.g., ability to develop others)
	Zaccaro et al. (2013) Social (e.g., training and developing subordinates, supporting and motivating)
Unafraid of decision-making	Zaccaro et al. (2013) Cognitive (e.g., decision-making capacity)

However, there is no single model that encompasses all the competences/skills identified in this research, which may be indicative of their context-specific nature. Nevertheless, some competences (i.e., social and communication; knowledge and experience) provide support for Yukl's (2013) model (see p. 54), which

confers a medium level of interpersonal skills (e.g., establishing relationships, communication skills) and a high level of technical skills (e.g., knowledge about methods and processes, products and services) to low managerial levels. That configuration seems to reflect the levels of skills required at operational level in contact centres.

Additional requirements. In addition to attributes and competences, it was strongly emphasised that an individual needed first to earn staff members' recognition in order to further gain their trust and respect and thus ensure their full commitment (see Figure 5.7 below). Without those three pillars, a leader was "*not going to achieve anything*" (Agent 5).

Figure 5.7: Sequence of additional requirements to be perceived as a leader



After being hired or joining a team, staff members within the team did not regard the newcomer "*as a leader straightaway*" (Agent 15). The process of gaining trust and respect was slow and relied on the prospective leader's actions and hard work rather than on the formal position: "*you just cannot walk in*" (Agent 5). A certain period of time was necessary for both agents and managers to "*prove*" (Agent 1, Manager 3) the rest of the team members that they were competent enough to assume leading roles and perform their duties (e.g., providing services to the group, 'stepping up' in a leadership position, keeping the group together, supporting agents, achieving goals...) and to gradually gain the trust and respect from others. That initial phase was critical, especially for managers, in order to obtain the team members' recognition.

It did take a little while for the people to come around to me and being a leader at the time [...] I had to sort of develop myself to let them see, despite the position, that I was capable of doing the job. (Manager 1)

As a leader, you need to earn respect from people. If someone is just coming and says 'I am a leader', she/he will not get very far and will not achieve anything because the people reporting to them and looking for

leadership from them will just see them as 'who are you? You are not a leader: you have not done anything to achieve that'; not as a leader. (Manager 6)

The same view was voiced from the agents' perspective:

"You have to deserve it [...] 'This leader' is not an authority just because is there. She/he has to deserve it and work for it." (Agent 16)

"That relationship [manager-agent] in the workplace can only be developed when there is trust, but trust is based on actions by the manager. Your actions will tell me whether I am going to trust you or not." (Agent 16)

In consequence, "deceptive", "manipulative" (Agent 15), or unfair individuals "pampering" (Manager 5) some staff members to the detriment of others were rejected as leaders since they failed to build trust with and gain respect from their colleagues (Barling et al., 2008; Christie et al., 2011). Trust was so important that its absence could have a negative impact on working relationships and, eventually, even on the customer service. Team members really needed to feel "in a safe pair of hands" (Agent 24); otherwise, the lack of trust could generate a domino effect of self-damaging consequences:

- agents would not ask/approach managers (Agent 30);
- managers would not be (fully) aware of the operations status (Manager 3);
- mutual trust would not be developed (Agent 26);
- staff morale and motivation would drop considerably (Agent 9); and,
- customer service might be affected, as explained below:

If you don't get trust from your leader, she/he will also lose trust on you, to some extent, and that relationship is broken down. It is really important, given that we are on a customer-driven service [...] If you don't have that trust there, it is not really good for customers. (Agent 26)

The emphasis given to trust and respect (having been preceded by earned recognition) seemed to reflect the key role played by the interactions and working relationships within a contact centre environment. This evokes again the adoption of a Leader-Member Exchange style by contact centre managers who actively

nurtured the development of high-quality relationships (Anand et al., 2011; Graen & Uhl-Bien, 1995; Uhl-Bien et al., 2012; Wallis et al., 2011).

As stated by Bolden et al. (2008a), there is a desire for strong and inspiring leaders who can “engender a sense of trust and openness” (p. 3), which has been supported by some research highlighting the existence of trust and respect in the leader as a social mechanism to further develop leadership (Avolio et al., 2004; Day, Fleenor, Atwater, Sturm, & McKee, 2014; Gardner et al., 2005; Podsakoff, MacKenzie, Moorman, & Fetter, 1990). In this regard, the findings of this study coincide with some empirical research (Bartram & Casimir, 2007; den Hartog et al., 2002) that showed how (transformational) leaders needed to enhance trust in the process of building working relationships with their followers, aware of the effects that trust from their staff could have on being perceived as a leader.

5.3.3.2 Transformational leader. Besides those individual attributes and skills identified above, the participants depicted an additional perspective of the leader figure, whose characteristics were consistent with the key dimensions (and most sub-dimensions) of the Transformational Leadership (TFL) model, as shown in 3.4.4, p. 97. First, each sub-dimension will be supported with evidence, to then provide an interpretation of the presence of this leadership style.

Individualised consideration. This dimension is comprised of six sub-dimensions that helped to establish whether the leaders’ behaviours towards their followers take into account their individual capacities and characteristics.

- Recognises individual strengths and weaknesses. Some agents stated that their respective managers understood that “*everyone is peculiar*” (Agent 13) or “*an individual*” (Agent 24) with different characteristics and competency levels, so they tried to help them develop the skills that “*they may not have or are not high enough*” (Agent 1) in order to tackle their weaknesses.

“Our manager is very good at recognising people’s strengths and weaknesses, noticing their mood, and how things are” (Agent 21)

“When I view potential and own initiative, I seek opportunities to pull and push on people’s strengths.” (Manager 9)

- Shows interest in the well-being of others. Some participants provided evidence of the consideration showed by their managers towards their staff: e.g., by getting involved in calls and showing interest (Agent 2); by dealing with personal concerns (Manager 6); or by improving the working conditions and morale (Agent 24).

It [being a leader] is, as well, taking a natural interest in your stuff. Every morning he will come up and ‘morning, how was your day off’; or, if you go on holidays, ask ‘where you’re going’, and take an interest in anything you’ve done or in your life, so you just don’t feel you are a number; you feel that you are part of the team and you are really involved and he takes a natural interest in you. (Agent 4)

- Assigns projects based on individual ability and needs. Managers often made decisions regarding the allocation of additional projects “*based on the task and capabilities of the team members*” (Agent 18), usually by assigning extra tasks or responsibilities to agents (e.g., coaching).

“They [managers] will decide ‘you are good at that; this person needs help, sit with them, and see what you can do to try to help them improve.’” (Agent 2)

- Enlarges individual discretion commensurate with ability and needs. Likewise, it was common practice for managers to increase team members’ autonomy based on their individual skills and the business needs (e.g., enhancing knowledge-sharing).

“He [the manager] is also encouraging specific people who are good at certain things to share their ‘best practice’ with other people and help them to build on it.” (Agent 4)

- Encourages a two-way exchange of view. Managers understood the importance of communication at their workplace, so they encouraged staff members to express their ideas and opinions to make them feel that “*they have been listened to*” (Manager 5). The approach was perceived as a “*two-way conversation*” rather than as an authority-dominated interaction in order “*to get their buy-in*” (Manager 10).

“When you are doing some feedback with an agent, it is a two-way discussion. You may know your team, your stuff; but, at the same time, you need to understand their point of view and what they need, and adapt to everything you learn.” (Agent 6)

- Promotes self-development. Agents from all contact centres reported that regular meetings held with their managers to discuss targets were also aimed at *“keeping you on track”* (Agent 4). In the process, managers motivated agents and helped them *“to focus on improving”* themselves (Agent 5).

“Our particular manager encourages you to improve yourself and to meet your own particular targets because that helps the team, but it always feel that we are all in the team and is not individually.” (Agent 1)

Self-development was also celebrated by managers:

“There is nothing better than seeing my members of staff progressing, getting promoted.” (Manager 1)

Inspirational motivation. This study has identified four out of the six sub-dimensions that *inspirational motivation* is originally comprised of. This dimension helps to establish whether the leaders’ behaviours inspire and motivate others.

- Convinces followers that they have the ability to achieve levels of performance beyond what they felt was possible. Managers tended to push agents *“out of our comfort zone”* (Agent 22) by allocating extra tasks and responsibilities to staff members in order to obtain *“the maximum from each and everyone”* (Agent 13) and eventually *“reach their full potential”* (Manager 1).

“It is almost pushing them as far as they can go to be great at their job and see that they are giving me as much as they can possibly give me. Bringing out the best of people.” (Manager 9)

“I had a team leader who helped me, motivated me, and inspired me to achieve something that I believe it was not possible for me.” (Agent 11)

“This person [team leader] speaks better about me than I can speak about myself. He says ‘why are you so hard on yourself?’ What I really like about

this person saying that is that is encouraging me to be a good worker.”
(Agent 16)

“Some people may not see themselves becoming a leader but I want them to know that it is possible for them because I have done it.” (Manager 6)

- Setting an example for others. Both groups of participants mentioned certain qualities (e.g., transparent, hard-working, positive, setting high standards) that they displayed themselves or expected from a leader. Those qualities seemed to inspire other staff members, who felt more identified with their leaders and adopted them as an orientation or role model in their work (Bass, 1985). Honesty and accountability were the qualities emphasised the most by both groups of participants, who also valued the fact that some of their managers had previously worked as agents because that way they could “*empathise with the agents*” and “*their issues*” (Agent 30) (Armistead et al., 2002).

“A leader has to be honest. I can accept and assist the manager if the manager is honest, and understand the implications, and accountability.”
(Manager 3)

“As a leader, I want to do the right thing; I want things to be successful by doing it the right way and having an understanding of what is right to achieve what you are looking for.” (Manager 6)

“I think that [a leader] is someone whom you can relate to, as well. Our manager was in the same role as us and worked her way up and probably deserves it, and she’s always demonstrated the skills to be able to perform in the role she is in now.” (Agent 5)

“I think that [manager’s name] is very competitive; he wants to be the best. He doesn’t make any secret of that. Because of that, he has all our respect and support, and we want him to be the best, so I need to be the best I can be in my team.” (Manager 8)

- Thinking ahead to take advantage of unforeseen opportunities. Some managers showed the capacity to plan ahead taking into account the overall context “*to recognise a situation, even before it happens*” (Agent 5).

“Sometimes, she/he can see ahead and say ‘we can do this differently or better by doing this’ by looking through a different angle.” (Agent 1)

“If we look at time, a leader is not looking at ‘now’; she/he is looking at the future. I need to think of my plan two or three months ahead.” (Manager 10)

- Provides meaning for actions. Managers made sure that staff members understood the tasks to be performed and why, particularly when it involved difficult decisions or came from higher hierarchical levels.

“The job is not going to get done well and you will not be able to roll out difficult decisions to a team if they do not understand why those decisions have been made.” (Manager 4)

“If a manager says ‘this is how it will be’ and I don’t have a full understanding, I’d think that something else is going on and I wouldn’t be happy.” (Manager 3)

“They [managers at higher hierarchical levels] need to explain why they say ‘no’ when someone is suggesting something and make them understand why it is a ‘no’; otherwise, what’s the point for them to come and speak to you?” (Managers 5)

Intellectual stimulation. This dimension refers to how leaders encourage staff to reconsider the way they perform their daily tasks. There was evidence that some managers tried to stimulate intellectually their team members by challenging their way of thinking, changing internal routines, and encouraging them to think differently in order to solve problems.

- Encourages followers to re-examine their assumptions.

“They [managers] can say ‘have you considered this?’, and, maybe, you haven’t. So, that kind of questioning is there to empower you to be able to make outside the box decisions or do something that we normally wouldn’t do.” (Agent 4)

- Creates a “readiness” for changes in thinking.

“Even if they come to me sometimes and ask me, I say ‘you know the answer to that one’ in a nice way, but I don’t give them the answer to make

them think by themselves and encourage them to take the initiative. I just don't want them to sit and be a robot doing the same thing day in and day out; I want them to be involved in different things.” (Manager 6)

- Creates a “holistic” picture that incorporates different views of a problem. *“I think she [manager] tries to encourage us to come up with a solution and, maybe, she will see whether she wants to add something in, too.” (Agent 22)*

Idealised influence. This dimension is comprised of leadership behaviours that usually generate respect and trust towards the leader.

- Transmits a sense of joint mission and ownership. Managers tried to instil a collective approach to task completion by “*taking ownership*” of the team (Agent 25) and by putting “*as much effort as everybody*” (Agent 1), making sure that each team member was valued and their contribution was acknowledged. To that end, managers enhanced collaboration among team members to support each other and to solve the problems together, as a team, because “*everyone is motivated to trying to achieve the same targets together*” (Agent 5) (Bush et al., 2012).

As an agent, I don't feel I am just another cog; I feel that I am part of a bigger machine. And that's part of what leadership is: you understand your role, no matter how small it is and they [managers] are aware of how important your role is, so you are not just another number and you are appreciated as a part of this bigger machine. (Agent 2)

What we've got just now is that people work together, encourage other people to do the best that they can do [...] So, when you need to ask someone to do a bit extra, then they are more than willing to do it because they know that everybody is working towards the same goal. (Manager 5)

- Expresses dedication to followers. Most agents described some practices implemented by their managers that showed commitment towards them. For example, managers made themselves available to everyone by sitting “*every day with a different team*” (Agent 1); worked “*with you every step of the way*” to

achieve personal goals (Agent 4); communicated “*a lot with the agents*” to get feedback about personal progress (Agent 10); or provided the necessary resources for the team (e.g., updated information) so agents “*are up to pick everything*” (Manager 6).

I make an effort with my whole team, so I am always available to them; I think that availability is quite important [...] I had the opportunity to sit somewhere else in the office, but I chose not to and sit amongst them, so there is that support there. I don't want to be invisible to them. (Manager 6)

“He takes his time to make sure that you got everything right in the morning and goes out of his way to make sure that his team is working and ready for the day.” (Agent 7)

▪ Appeals to the hopes and desires of followers and addresses crises “head on”. These two sub-dimensions have been placed together because they share a common characteristic: meeting agents’ expectations, which managers manifested in several ways:

“When we achieve success, he shares it and celebrate it in the same way as we do. He doesn't take all the pride for our hard work, although he does contribute to it a lot.” (Agent 5)

“He has influence because he has authority, but he does not use the authority to get influence.” (Agent 2)

“Someone in a leadership position does not need to be the bad guy, but she/he needs to be tough when it is needed.” (Agent 12)

“What you want in a good leader is: ‘look, this is where we are, we need to get here, let's work together to get it done’; and not ‘I am going to be over your head with a hammer and a stick.’” (Agent 21)

5.3.3.3 Transactional, Passive/Avoidant, and Pseudo-transformational leaders. Unlike transformational leaders, participants rejected transactional, passive/ avoidant, and pseudo-transformational leaders because of their inherent attitudes and behaviours associated with their characteristic dimensions. The examples below represent exceptions rather than the norm.

Contingent reward.

“He would say ‘there is your target. I want you to get better than [agent’s name]’, and he would give you money, or a prize, or something like that if you got it. It was just so strange! However, our manager now encourages you to work within your own abilities.” (Agent 4)

Management by exception (active).

“A leader is someone who wouldn’t say ‘it is half past eight, why are you not on the phone?’ Or ‘today you have to do this, this, and this; and if you don’t it, this will happen.” (Agent 21)

Management by exception (passive).

“She [main manager] stayed in the office all day and did not even talk to us, she didn’t interact with the managers unless they went into her/his office, and didn’t have contact with the agents other than when she had to tell them that they haven’t done something.” (Manager 5)

Laissez-faire.

“We got a team leader at night, but she took the heat on. She said ‘I don’t want any escalations, and if you got any escalations, do not come to me’, that sort of thing; but, all changed and you got team leaders now and they are responsible.” (Agent 18)

Pseudo-transformational.

“As an agent, I had a team leader who led the team by fear. It was an absolutely awful place to work: the stress levels were high because the way she worked. You were scared to get it wrong. She got results, but she got results through fear.” (Manager 8)

The thinking and behaviours derived from those leadership styles are at odds with the ethos of TFL, since the leaders:

- used “*money, or a prize*” (Agents 4, 19) or compared “*your count rating*” to someone else’s to try to improve individual performance (Agent 5) (Nguni et al., 2006; Rothfelder et al., 2012);

- avoided “*contact with the agents*” (Manager 5) or refused to help them with “*any escalations*” (Agent 18) (Erkutlu, 2008); and
- “*lead by fear*” to get results while increasing the staff’s stress levels (Manager 8) (Christie et al., 2011; Barling et al., 2008).

Those leadership styles lacked support within a contact centre environment, which shows correspondence with some studies that reported a preference for transformational over transactional and passive/avoidant leaders (Bass, 1985; Erkutlu, 2008; Rothfelder et al., 2012; Singer & Singer, 1990).

It is possible to explain the choice of TFL over the other styles based on its aim to inspire and motivate staff members (inspiration and motivation were recurrent themes mentioned by participants) and because it also takes into account the needs and requirements of both managers and agents (e.g., personal support, professional development, higher autonomy, two-way communication, team orientation) at their workplace (Antonakis & House, 2013; Avolio, 2011; Avolio et al., 2009). In other words, TFL may be favoured within contact centres because it fulfilled the aims of staff members with its inclusive and close approach to people; as opposed to TSL, based on a contractual transaction (e.g., rewards in exchange for performance) (Antonakis, 2012; Walumbwa & Wernsing, 2013).

The presence of TFL in a contact centre at operational level coincides with some studies that found evidence of such style in mechanistic organisations at low hierarchical levels (Dumdum et al., 2013; Edwards & Gill, 2015; Geier, 2016; Rothfelder et al., 2012); but also challenges empirical findings showing that TFL was most likely to be implemented at higher hierarchical levels in organic organisations (Dust et al., 2014; Erkutlu, 2008; Sarver & Miller, 2014). This inconsistency suggests that organisational hierarchy and design do not necessarily influence the enactment and development of TFL, which adds knowledge to the limited research conducted on TFL in contact centres (Bartram & Casimir, 2007; Bramming & Johnsen, 2011; Kensbock & Boehm, 2016; Tse et al., 2013).

In conclusion, the key finding of this section supports mostly the view originally depicted by Burns (1978), who considered both leadership behaviours (i.e., TFL

and TSL) as two opposite ends of a continuum so a leader can only apply one style at once. This is opposed to conceiving both leadership behaviours as two separate dimensions, meaning that a leader could implement both styles simultaneously (Bass, 1985). This does not mean that TSL is not exercised subtly or explicitly in contact centres (as shown above), but lacks of acceptance so the managers tend to implement only TFL whenever is possible. The predominance of TFL suggests that both styles are not necessary for effective leadership practice (Fernandes & Awamleh, 2011), thus contradicting theory and empirical research on the topic (Analoui et al., 2012; Bass, 1985; Bass & Avolio, 1993; Birasnav, 2014). Therefore, the *augmentation effect* of TFL over TSL does not take place in contact centres, showing that TFL does not need to build on TSL for effective leadership practice (Edwards & Gill, 2012).

5.3.3.4 Managers and leaders. Most participants from both groups regarded managers and leaders as two differing and clear-cut roles, irrespective of whether they were performed by one or two different people. However, each role involved a distinctive approach with different purposes:

- a leader used her/his persuasion-based influence and interacted more often with staff to motivate, support, and inspire them in order to enhance their development and make them “*buy in*” (Agent 1; Manager 9); whereas
- a manager, in contrast, used mainly her/his authority and focused mostly on task-completion and performance standards to make the business run smoothly (Kent et al., 2001; Kotter, 1990; Statt, 2000; Storey, 2011; Zalenik, 1977).

Especially emphasised by agents was the “*human aspect*” (Agent 9), “*personal approach*” (Agent 6), or “*person touch*” (Agent 19) characteristic of leaders; as opposed to the managers’ business-oriented mind-set centred “*more on results and stats*” (Manager 6) and “*efficiency*” (Agent 9), and “*not as close to the people ‘on the floor’*” (Manager 3).

“*A manager deals more with the processes, the formal side of things, and I think that being a leader is more about inspiring and motivating your people*” (Manager 1)

“A manager is more like process-driven, more about ‘this is what you need to do’. It is quite harsh. A leader just guides you, and is more about the people.” (Agent 23)

Although managers preferred the leader role, they were “so controlled” (Manager 7) by some factors (e.g., performance standards, disciplinary action) that they eventually had to shift towards the managerial role and “just fired up the stats” (Agent 21).

“We all plan to lead but, if we lead and do not get the results we desire, we will get into that management role and everything will be about ‘I tell you what I expect’ rather than trying to coach you around what I want you to do.” (Manager 9)

Similarly, another manager acknowledged their dual role:

“At times, as a leader, I may change my role into a manager, taking off my leadership hat and putting on my manager hat, because they [agents] may not be following processes or procedures correctly, or achieving targets.” (Manager 10)

The preference, not only by agents but also by managers, for the leader rather than for the managerial role seems to be clearly based on the more appealing people-oriented approach of leaders. Actually, agents reported widely the occasional and distant contact with managers, in contrast to the close interactions and relationships that they usually built with leaders.

“To me, a manager is like someone higher up and don’t really think about everybody down the bottom, how much hard work they put in; whereas leaders are with you down the bottom doing the same hard work to build you up.” (Agent 4)

“There can be managers who don’t come out of their offices, don’t know the agents’ names, and they just work on the bottom line figures, and that became difficult because that’s managing figures rather than leading people.” (Manager 5)

As leaders had a genuine concern for people, they had the capacity to create a “good” (Agent 25), “safe” (Manager 6), and “open” (Manager 10) working environment that made staff feel free to share their opinions and get more engaged and motivated at work. Managers, in contrast, could generate “a negative environment to work in” (Manager 5), making staff feel disoriented and uncomfortable.

“I’d be much more motivated to work for a leader rather than a manager, simply because I’d rather work for a person rather than for my own stats.”
(Agent 30)

You can tell the difference if you go round the big building where people are doing different things in different places. You can see a team that is well managed because everybody gets on with their work and are doing everything, but looks terribly different where there is a leader: there is an atmosphere, you can feel it when you walk in. People are motivated to do the job and naturally help people out, and they don’t have to be asked.
(Agent 1)

In addition to the mainstream view, a few participants described alternative perspectives regarding the relationship between leadership and management:

Leadership encompassing management

The leadership aspect is much more than managing the team [...] A manager is someone sitting back and pointing where we need to go, whereas a leader is someone who is pulling from the front knowing where we need to go and what we need to do. Anyone can manage, but not everyone can lead. (Agent 30)

Management encompassing leadership

“Leaders are people who others look up to and look to for advice and guidance. Managers have these qualities too; however, in addition, they have people actually working for them and they carry more responsibilities.”
(Agent 3)

Integrated roles that cannot separate from each other

I genuinely don't really see too much of a difference between being a manager and being a leader. The way I do my job has never changed whether I am a manager or a leader. My job is exactly the same [...] I think that leadership and management actually integrate most of the time.
(Manager 8)

Based on the above, the findings support four out of the five leadership and management perspectives proposed by Simonet & Tett (2013) (see Chapter 3, p. 57). However, unlike most authors favouring the *bidimensionality* perspective (not found in this research) that distinguishes between leaders and managers and also acknowledges their complementary roles (Algahtani, 2014; Kotter, 1990, 2001; Toor, 2011; Young & Dulewicz, 2008), contact centre staff perceived both roles as opposite (i.e., *bipolarity* perspective) based on their different values, behaviours, processes, and purposes (Bennis & Nanus, 1985; Zaleznik, 1977). This implies that participants considered that both roles are mutually exclusive and do not complement each other, despite the fact that both are actually implemented in their respective workplaces.

5.3.3.5 Summary. Leaders require a set of individual attributes and competences to be considered as such in contact centres. TFL was the style consistently applied by managers and the one preferred by agents, while Transactional, Passive/Avoidant, and Pseudo-transformational Leadership styles were rejected, although there was evidence of having been occasionally implemented. In addition, leaders and managers were clearly distinguished from each other and perceived as two opposite rather than as complementary roles; while managers preferred to act as leaders, they were usually forced by certain circumstances to adopt a managerial role.

5.3.4 Leadership practice. This section will analyse the extent to which the leadership practice(s) of contact centre staff is/are individual- or collective-oriented in order to identify the corresponding leadership theories.

Leadership practices in contact centres manifested in two different ways that will be analysed below: only individually, or blending individual and collective leadership.

5.3.4.1 Only individual practice. In some contact centres, a few managers (had) exercised leadership in exclusivity (i.e., sole leader) (Crawford, 2012; Spillane et al., 2007). Although that approach only applied to a reduced number of managers in higher hierarchical positions (at operational level) than the managers interviewed, it was clearly perceived that neither the managers nor the agents were satisfied with that individualistic approach to leadership. Some managers were “*not really interested*” (Agent 4) in working differently, foster interactions among staff members, or having more interactions with others.

He [manager] makes decisions and that's the way it goes [...] There are some managers who work in isolation; they know their job, their team, and just keep themselves to themselves. I think that they can do that because the business does not put a lot of emphasis on that [collective decision-making]. (Manager 7)

There are several practical reasons whereby some managers performed leadership practice individually (e.g., type of task, team size), but their determination to monopolise the decision-making process and the lack of a strong organisational culture that favoured individual over collective leadership practice were cited as the fundamental ones (Copland, 2003; Harris, 2005, 2012; Torrance, 2009). The literature on leadership provides illustrative examples of individuals in formal leadership positions who reject to “relinquish power to others” (Harris, 2004, p. 20) because of the loss of direct control over some leadership tasks/responsibilities (Bolden et al., 2008a; Gosling et al., 2009; MacBeath et al., 2004).

That situation actually reflects the ‘top-down’ leadership model that still dominates organisations, which is manifested here in the form of structural (i.e., managers’ monopoly of decision-making) and cultural barriers (i.e., organisational culture). The latter are perhaps the most difficult ones to change since they involve replacing long-established notions, habits, and top-down models of leadership with a leadership practice that is “more organic and spontaneous” (Harris, 2005, p. 23) that emerges from the interaction of multiple individuals to accomplish tasks. It appears highly unlikely that that leadership practice was accepted by those managers exercising leadership individually.

5.3.4.2 Individual and collective practices. To differing degrees across the contact centres, most participants perceived that the daily work was performed through a combination of individual (i.e., solo leadership) and collective leadership practices that “*complemented each other*” (Manager 6). A framework was depicted whereby managers took responsibility and performed exclusively certain leadership tasks (e.g., daily reports forwarded to senior managers), but were also willing to “*delegate*” (Agents 15, 30) some leadership tasks and responsibilities (e.g., call monitoring, training) and share the decision-making with agents for others (e.g., problem-solving), so all team members were involved somehow in leadership practice (Bolden et al., 2008a; Bush et al., 2012; Collinson & Collinson, 2009; Timperley, 2005). As a result, managers and agents tended to “*work very closely together*” (Manager 1).

“Within the teams, the team leader is the individual leader, and between team leaders and agents there is collaborative leadership as a group rather than necessarily individually.” (Agent 2)

That approach replicates the findings from some studies (Bolden et al., 2009; Gosling et al., 2009; Harris, 2008) showing that, despite the existence of a collective leadership approach, there is still the need for formally appointed leaders to provide vision, direction, and monitoring.

The following sections will break down (1) the collective leadership practice (i.e., Distributed Leadership) implemented in contact centres by describing its properties in an attempt to understand its nature; and (2) the purpose(s) behind the emergence of individual and collective leadership practices combined simultaneously (i.e., Hybrid Leadership).

Distributed Leadership. Managers and agents outlined a collective leadership practice characterised by four pillars, each applied to different extents in each contact centre, which were consistent with the key properties of Distributed Leadership (DL) (see section 3.4.5.2, pp. 104-105) that will be explored below (Bennett et al., 2003; Duif et al., 2013; Gronn, 2002b; Mehra et al., 2006).

- *Autonomy.* Agents enjoyed differing levels of autonomy, depending normally on their managers' disposition to empower team members or to formally delegate some leadership tasks (e.g., attending meetings, training new staff, designing plans of action, solving escalations) in order to meet the business needs.

She [the manager] can say to someone 'I've got this meeting and you are going, and let me know how you get on when I come back'. She will give them the backup information, and they will go and make the decisions as if they were [manager's name]. She is so open about how she runs things! She does delegate within her own group, but she doesn't say 'this is what I want you to do or say' or 'don't agree with anything until I got there' or 'you can only say "yes" to these things'. (Agent 1)

Autonomy is one of the key properties of DL that involves decision-making capacity through empowerment or delegation (Bennett et al., 2003; Bolden et al., 2008a; Scribner et al., 2007). Even within the parameters of their interactions with customers, some agents felt that they had decision-making capabilities since there was "*an opportunity for us to make a decision*" (Agent 21) within certain boundaries; for example, by assessing customers' needs, assigning compensations, or addressing complaints without the managers' intervention (Duif et al., 2013; Ritchie & Woods, 2007; van Ameijde et al., 2009).

While there might be several factors that influenced the scope of autonomy conferred by managers to agents, it seemed that the delegation of leadership tasks and responsibilities was not random but actually based on the trust in the agents and their individual capabilities to deal efficiently with those (Angelle, 2010; Tian et al., 2015; van Ameijde et al., 2009). By increasing their autonomy, agents could learn how to make decisions by themselves and gain valuable experience that could be further applied in leadership roles or demanding situations, thus becoming "*more independent and less reliant*" on managers' support (Agent 5). Furthermore, on those occasions, agents felt more responsible and more motivated because they were "*part of the 'bigger picture' and they are not just following orders*" (Agent 6). That approach, in turn, encouraged agents to take the initiative more often by proposing new ideas to improve the customer

service (Angelle, 2010; Duif et al., 2013; Leithwood et al., 2004; McBeath et al., 2004).

In many instances, agents will take the initiative and reach decisions on their own without reference to any manager. Individual agents can also and do drive change within their teams and across the centre by applying their own initiative; for example, sharing a successful sales technique with others in the team and in the business. (Agent 26)

- *Expertise.* Team members were always encouraged to express their opinions and share information with others. Thus, everyday interactions and discussions between managers and agents symbolised an arena where each individual could propose ideas and solutions to regular issues or make suggestions based on her/his relevant knowledge and experience on the matter at hand.

In a morning meeting, we discuss what was going on the day before, so we try as a team to work it out right to make sure that it does not happen again. Everybody will come up with their own ideas and we will take them on board if we think they are right. Sharing information and problem-solving between agents is very common and is encouraged by the leadership team. (Agent 23)

In addition, each agent within each team was allocated a specific area of expertise to become the main suppliers of information to the rest of the group, including managers. Specific roles were also extendable to the management team, whose members specialised in different areas of the business with their corresponding responsibilities based on their individual “*strengths*” (Manager 6) (Bush et al., 2012; Greenfield et al., 2009).

I have people in my team with [agent’s internal role] in a specific area and they lead others [...] They take the opportunities in meetings to talk about it and influence the team in that area; so, in a way, they are leading. (Manager 7)

That internal organisation reflects the emergence of a new division of labour, which is the key factor that has contributed to the development of DL in current

organisations by creating interdependencies and mechanisms of co-ordination among team members (Gronn, 2000, 2002b). In the present case, that division of labour was promoted to generate a constant flow of information within the group that facilitated knowledge-sharing within the team and beyond, which, ultimately, may have contributed to service improvement across the contact centre (Stevens, 2014). Additionally, the existence of specialised roles within a team based on expertise boosted each individual's profile as a leader since the rest of team members "*know whom you need to ask questions*" for each matter (Agent 19), thus increasing individuals' development and participation in leadership practice (Duif et al., 2013; Ho & Ng, 2012; Jones et al., 2010; Kennedy et al., 2011; Zhang et al., 2007).

Both quotations above portray agents who "stepped up to the plate" (Hudson et al., 2012, p. 782) of leadership practice by using their knowledge and expertise to influence others. Furthermore, those examples show that any team member can potentially emerge as a leader, in a particular occasion and under certain circumstances, based on their relevant knowledge or expertise in a certain area (Dinham et al., 2008; Gronn, 2002b; Kennedy et al., 2011), implying that "influence is exercised through expert rather than positional power" (French & Raven, 1957; Leithwood et al., 2009a, p. 247). From that it follows that multiple individuals can assume the leader's role, which will "pass from one individual to another as the situation changes" (Gibb, 1954, p. 902), increasing subsequently the number of staff members who participate in leadership practice.

Likewise, those examples also evidence that knowledge and expertise do not reside in one single person; instead, it is dispersed across the whole organisation (Spillane et al., 2001, 2004) since staff members possess "varieties of expertise" (Bennett et al., 2003, p. 7) and skills that can be useful in the everyday running of an organisation. This does corroborate the importance of acquiring knowledge and developing expertise at the workplace, widely cited as a property of DL (Bennett et al., 2003; Copland, 2003; Day et al., 2009; van Ameijde et al., 2009).

- *Teamwork.* Teamwork and/or collaboration among team members was acknowledged as a common practice in all contact centres by staff members, who "work quite close" (Manager 10) as a team while performing simultaneously

their internal leadership roles. Regular interactions, team meetings, and informal discussions contributed to enhancing the teamwork spirit to “help out each other” (Agent 17) and “work together as one” (Manager 10) (Dinham et al., 2008; Brandstorp et al., 2015; Bush et al., 2012; Jones et al., 2010; Spillane et al., 2004).

“It is not about yourself but about working for the team, sharing best practices, and working together.” (Agent 27)

Even if you have your own responsibility for your own individual performance, from time to time you will be reminded that your performance is affecting the whole team, so you are not an isolated person. What you do, it does not only matters to you, it matters to the team. (Agent 26)

That approach is consistent with the experience described by Bolden et al. (2009), in which leadership responsibilities are delegated to staff members, but the performance of their respective tasks are conceived from a team rather than from an individual perspective. Based on the feedback, teamwork appeared to be strongly promoted by managers in order to ensure work consistency, enhance knowledge-sharing (e.g., best practices), and meet performance standards; but also used as a mechanism to maintain staff job commitment and motivation (Bush et al., 201; Duif et al., 2013; Hulpia et al., 2011; Iles & Feng, 2011; Li et al., 2009). Furthermore, teamwork involving only managers or managers and agents seemed to be especially oriented to take advantage of the potential synergy that may result from the contribution of all team members to tackle problems and to complete promptly the daily workload (Aaron & du Plessis, 2014; Day et al., 2009; Dean, 2007; Gronn, 2002b; Wallace, 2002).

If there is a contact centre general issue, the four of us [managerial team] discuss it as a whole and we are all involved. The managers are more than happy for the team leaders to provide input and opinions [...] In my team there are a lot of conversations. If someone has a customer and doesn't know what to do, people [agents] express their opinions. There are different levels of experience and skills; there are people who have been there for fifteen years or for six months. I think that we complement each other and do the work better as a group. (Manager 6)

- *Interdependence and coordination.* Although it might be implied due to the emphasis on teamwork, participants did not provide strong evidence of interdependence and coordination among agents when performing leadership tasks. They did, however, provided examples taking place at higher hierarchical positions (i.e., among different managerial positions) at operational level.

The two team leaders – my another colleague and myself – have a lot of experience and knowledge of the business and the contact centre and, again, we complement each other quite nicely because there is an expertise and knowledge in one side, and this sort of creative and adapted-to-change [capacity] on the other side to work together. (Manager 6)

This imbalance between managers and agents may actually lie on the nature of their respective jobs. In contrast to most of the work conducted by managers, which may encompass different tasks that can be easily shared and organised involving several people, the work usually performed by agents (i.e., answering phone calls, data entry) is highly individualised and standardised, which means that agents do not require to establish any relationship of interdependence and coordination with other workmates in order to complete their work (Bain et al., 2002; Brophy, 2015; Fernie & Metcalf, 1998; Lloyd, 2016).

“Our day-to-day tasks are quite individual and do not naturally lend themselves to a collective effort.” (Agent 2)

Nevertheless, the role allocation based on individual expertise mentioned above represents an example of interdependence and coordination among agents that also involves managers: each individual is responsible for providing updated information in time and relies on others to do the same when needed. Those complementary responsibilities and their mutual need for support manifests their interdependence, which consequently requires coordination among team members to be performed effectively, as shown in theoretical and empirical research (Gronn, 2002b; Leithwood et al., 2006; MacBeath et al., 2004; Ritchie & Woods, 2007; Seong & Ho, 2012; van Ameijde et al., 2009; Zhang et al., 2007). Overall, the staff members' capacity to assume leadership tasks/responsibilities within their level of autonomy, to perform teamwork in an interdependent and

coordinated manner, and to make an effective use of their knowledge and expertise confirm the effective implementation of DL conceived and explained by Gronn (2000, 2002b).

Hybrid Leadership: purposes. It was found that the combination of individual (i.e., solo) and collective (i.e., distributed) leadership practices – also known as Hybrid Leadership (Gronn, 2008, 2009b) – responded to four specific purposes, shown below by order of importance:

- *Staff development.* This was the purpose mostly cited by participants to explain why individual and collective leadership were simultaneously implemented in contact centres. As mentioned several times along the chapter, staff development was possible by allocating leadership tasks for which managers were initially responsible (e.g., coaching new staff, solving escalations, monitoring calls, leading the team). Both groups of participants agreed that such opportunities helped them to gain experience in leadership roles, balance staff capabilities, and acquire a wider perspective of the business to perform leadership tasks and get further promoted towards leadership positions. Furthermore, the collective practice of leadership did not only help to develop themselves but also to “become more involved in their development” (Agent 2). Managers, in particular, stated clearly that agents were “not going to get there” (Manager 5) if they did not delegate leadership tasks.

As a leader, I think you need to make the people that you manage understand how the business works; so, sometimes, leadership should involve other people exploring the possibilities, making the decisions, and being part of the process. (Manager 2)

A different manager shared the same perspective:

There are a few agents in my team to whom I allocate leadership responsibilities. When we do inductions for the new starts, I get a couple of the girls to go and do presentations and staff training [...] If there are opportunities for them to do [internal development programme], they can spend a day with a team in different departments and see how they work day-to-day, and that also builds on your knowledge and experience. (Manager 6)

Personal development did not represent an end by itself and was somehow conceived as an organisational investment whose importance resided on the future advantages that could generate for the contact centre:

This [collective practice of leadership] also helps identify and nurture future leaders for the company as well develop their employees' skills. The main thing about being a leader is to create something and then hand it over to someone else to keep on developing and pass it on and on and on. (Agent 15)

Staff development constitutes an area of interest for contact centres, which allocate considerable resources to improve their staff's knowledge and skills, and will increasingly need to do so in order to adapt to technological advancements (CFA, 2012; DimensionData, 2016b, 2017; Sutherland et al., 2015). Bearing in mind the high absenteeism and turnover rates within the industry (Townsend, 2007), the emphasis on staff development probably contributes to:

- building a more knowledgeable and experienced workforce able to deal with the working demands. Better prepared employees are more likely to stay in the organisation, which reduces staff turnover and, subsequently, further recruitment and training costs (CallCentreHelper, 2016; Holman et al., 2007; Hucker, 2013; Sutherland et al., 2015); and
- transferring knowledge and skills from current staff' to new recruits in a practice that, on turning into a regular cycle, could reduce the new recruits' learning process and thus minimise training costs and eventually enhance performance (CFA, 2012; Garavan et al., 2008).

▪ *Adapting to changes to ensure work completion.* Contact centres are dynamically-changing environments where staff usually had a high workload. All the processes and procedures, growing escalations, or "massive queues building up" (Agent 7) made the work harder and increased the pressure on staff, particularly managers. In those circumstances, managers tended to delegate leadership tasks to agents in order to cope with the ongoing challenges and "adapt to changes" (Agent 26), so the work could be completed and the performance standards were maintained.

“It is a way to make sure that all the daily tasks and work within the contact centre are done properly and in time, so everybody is involved in it to different extents.” (Agent 19)

A changing environment also triggered the shift towards Hybrid Leadership:

If you are willing to work with change, you need to give leadership to them [agents] in certain areas, and I think it is effective and necessary. They [managers] couldn't have managed in the last six or seven months with change if they had not involved us [agents]. That would have been probably disastrous. (Agent 26)

As all staff members were involved in leadership, the responsibility for ensuring that the contact centre “*runs smoothly*” (Agent 1) was shared and did not necessarily rely only on one person all the time, yielding positive outcomes for “*both customers and employees*” (Agent 19) in terms of service standards and job commitment, respectively.

This purpose is consistent with the theory proposed by Gronn (2008, 2009a, 2009b), whereby the application of a Hybrid Leadership (HL) configuration would respond to the need to react to the internal/external circumstances and challenges facing the organisation and thus adapt effectively to the conditions of a rapid-changing environment. There are studies in education and healthcare contexts that have provided empirical evidence of diverse HL configurations aiming at dealing with the ongoing changes affecting the organisation (e.g., Buchanan et al., 2007; Collinson & Collinson, 2009; Day et al., 2009; Fitzgerald et al., 2013; Greenfield et al., 2009), but none of them in a contact centre environment.

- *Reducing managers' workload.* Managers assigned regularly leadership tasks and responsibilities to agents (e.g., solving escalations, attending meetings, monitoring calls, or training) in order to “take a little weight off their shoulders” (Agent 30). Taking into account the high workload and the teams' sizes, managers would “struggle to manage the business” and teams would become “unmanageable” (Manager 2) if they did not share part of their tasks and responsibilities with agents. Therefore, leadership became “a shared resource” (Manager 4) rather than the property of one individual.

“I think that some team leaders allow us to do that [performing leadership tasks and responsibilities] because it takes some of the work off their back.”
(Agent 9)

Others, in contrast, viewed it as an opportunity for development and collaboration:

“We don’t see it [leadership] as being clear-cut; everyone can learn their expertise either way, mostly up, to help with the kind of things that team leaders do and eventually help out [managerial positions].” (Manager 4)

That way, managers were more relieved at work and could allocate more time to perform other tasks that required their attention, while agents could progress in their professional development, in line with the findings of some studies on DL (e.g., Grubb & Flessa, 2006).

- *Minimising errors and risks.* Finally, contact centres also combined individual and collective leadership practices to prevent staff from committing mistakes (e.g., errors in regular tasks) that might damage customers’ rights or interests. The higher number of staff members involved in leadership, the more likely to detect mistakes as more individuals were performing leadership tasks. This reduces errors and, ultimately, enhances business efficiency. Additionally, the distribution of leadership contributed to avoiding employee turnover: the increasing participation in leadership practice equally increased staff members’ job satisfaction, thus reducing significantly their prospects to leave.

“Maybe one of the processes is not right, and this is what we [agents] think how it should be. We are improving the business.” (Agent 27)

“They had to make all of those changes [towards collective leadership practices] because many agents were leaving. Since they start, one month training, and one week later they get their first salary and leave.” (Agent 8)

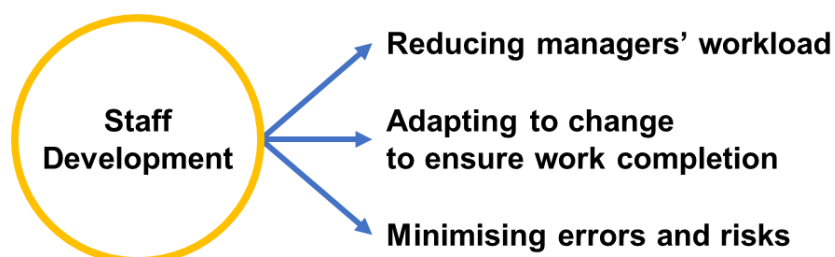
In that respect, if one single person made all the decisions as ‘the leader’, then that structure “*wouldn’t work*” because agents would not have “*equal opportunities*” (Agent 20) to participate in the decision-making.

Those findings are consistent with some studies by some DL authors (Gronn, 2002b; Harris, 2008; Leithwood et al., 2009b), who have actually highlighted the capacity of DL to decrease the likelihood of committing mistakes, either because there were more individuals involved in a given leadership task who could detect the potential errors; or because of the patterns of interdependence between them, whereby they could overlook each other's work. On the other hand, the fact that the application of HL configurations helps to reduce staff turnover comes only to confirm the interest of non-formal leadership roles (i.e., agents, namely) in leadership practice as well as to reflect the increasing need to adopt this collective leadership practice in contact centres.

Based on the above, this research extends the view that the purpose of combining individual and collective leadership practices (i.e., Hybrid Leadership) consists of adapting to the changing circumstances of the organisational environment (Gronn, 2008, 2009a, 2009b, 2011). Actually, the adoption of hybrid configurations of leadership can also pursue other purposes, such as staff development, the reduction of manager's workload, and the minimisation of errors and risks.

While Gronn's research on HL was conducted in educational contexts, the specific characteristics of contact centres (e.g., in terms of goals, pressures, job nature, work organisation, performance standards, business-oriented approach...) may explain the emergence of additional purposes, whose existence seem to reflect some of the major areas of concern for staff to perform effectively their jobs at operational level. In fact, staff development appeared to be the key purpose that facilitated the possibility of performing the others (see Figure 5.8 below).

Figure 5.8: Purposes of combining individual and collective leadership practices



The development of staff contributed to reducing managers' workload as other team members (i.e., agents) could perform some of their leadership tasks and responsibilities. In doing so, managers could adapt more easily to changing circumstances by organising their qualified staff to ensure that the daily work at the contact centre was completed. Likewise, staff development led to an increasing participation of team members in leadership practice that enhanced knowledge-sharing and collaboration within teams, so each staff member was updated and supported at all times. Those working dynamics, in turn, contributed to minimising risks in the performance of tasks and thus enhanced the overall efficiency in the contact centre.

5.3.4.3 Summary. Leadership in contact centres is implemented either individually or by performing simultaneously individual and collective practices. The combination of individual and collective (distributed) leadership practices in contact centres suggests the implementation of HL configurations, which was driven by four purposes: (1) enhancing staff development; (2) adapting to change to ensure that the work was properly completed; (3) reducing manager's workload; and (4) minimising errors and risks. Staff development appears to be the key purpose that enables the implementation of the others. Table 5.6 below displays an overview of the key findings of this research. Each finding is associated with a section on the Literature Review and a corresponding research question.

The analysis and interpretation(s) of the findings conducted in this chapter have provided a valuable insight into the perceptions of leadership in a contact centre environment. This has facilitated a further discussion on their relevance in relation to the current literature on the topic and, in turn, to draw their corresponding implications. Now, it will be possible to outline the main conclusions, recommendations, and potential avenues for research derived from this study, which will be undertaken in the next chapter.

Table 5.6: Summary of findings (key findings in red)

Themes	Key Findings								
Leadership	1. Main ideas (3.2.1) <ul style="list-style-type: none"> ▪ Influence mainly based on persuasion ▪ Working relationship focused on support and based on trust & respect, i.e., LMX Theory (3.4.3.3) ▪ Team management ▪ Importance of goal, purpose, and/or outcome 		1.1 Conceptualisations (3.2.1) <ul style="list-style-type: none"> ▪ Innate and developed ▪ Naturally-arisen, not allocated 	1.2 Related concepts (3.2.2) <ul style="list-style-type: none"> ▪ Authority ▪ Control ▪ Power 					
Leader	Profile	2.1 Attributes and competences (3.3.1; 3.4.1.1; 3.4.1.2) <table border="0" style="width: 100%;"> <tr> <td style="vertical-align: top; width: 50%;"> <ul style="list-style-type: none"> ▪ Charisma, confidence, and attitude ▪ Open-minded ▪ Own belief and determination ▪ Knowledge and experience </td> <td style="vertical-align: top; width: 50%;"> <ul style="list-style-type: none"> ▪ Social and communication skills ▪ Adaptation capacity and flexibility ▪ Provision of support and motivation ▪ Unafraid of decision-making </td> </tr> </table> <p style="text-align: right;">Additional requirements:</p> <ul style="list-style-type: none"> ▪ Recognition ▪ Mutual trust ▪ Mutual respect 			<ul style="list-style-type: none"> ▪ Charisma, confidence, and attitude ▪ Open-minded ▪ Own belief and determination ▪ Knowledge and experience 	<ul style="list-style-type: none"> ▪ Social and communication skills ▪ Adaptation capacity and flexibility ▪ Provision of support and motivation ▪ Unafraid of decision-making 			
<ul style="list-style-type: none"> ▪ Charisma, confidence, and attitude ▪ Open-minded ▪ Own belief and determination ▪ Knowledge and experience 	<ul style="list-style-type: none"> ▪ Social and communication skills ▪ Adaptation capacity and flexibility ▪ Provision of support and motivation ▪ Unafraid of decision-making 								
Transformational Leadership: Individualised consideration, Inspirational motivation, Intellectual stimulation, Idealised influence (3.4.4)									
2.2 Managers and leaders (3.3.2) <ul style="list-style-type: none"> ▪ Different roles and focus: managers use authority, are task-oriented, and focus on completing tasks and performance; leaders use persuasion, are people-oriented (e.g., support, motivate, inspire), and focus on staff development ▪ Individuals may shift from one to the other according to the circumstances ▪ Perspectives: (1) opposite roles (i.e., bipolarity); (2) leadership encompasses management; (3) management encompasses leadership; and (4) integrated roles 									
Leadership practice	Hybrid Leadership	3. Individual/collective practices: (3.4.1-3.4.4 traditional individual-oriented theories & 3.4.5 new collective-oriented perspectives) <table border="0" style="width: 100%;"> <tr> <td style="vertical-align: top; width: 50%;"> Individual practice – performed by one single person (i.e., manager) </td> <td style="vertical-align: top; width: 50%;"> Purposes of Hybrid Leadership (3.4.5.3) <ul style="list-style-type: none"> ▪ staff development ▪ adapting to changes ▪ reducing managers' workload ▪ minimising errors & risks </td> </tr> <tr> <td style="vertical-align: top;"> Collective practice – performed by most or all staff members regardless of their role, status, or position within the organisation (e.g., managers, agents) </td> <td></td> </tr> <tr> <td style="vertical-align: top;"> <u>Properties:</u> <ul style="list-style-type: none"> ▪ autonomy ▪ expertise ▪ teamwork ▪ interdependence & coordination (i.e., Distributed Leadership (3.4.5)) </td> <td></td> </tr> </table>		Individual practice – performed by one single person (i.e., manager)	Purposes of Hybrid Leadership (3.4.5.3) <ul style="list-style-type: none"> ▪ staff development ▪ adapting to changes ▪ reducing managers' workload ▪ minimising errors & risks 	Collective practice – performed by most or all staff members regardless of their role, status, or position within the organisation (e.g., managers, agents)		<u>Properties:</u> <ul style="list-style-type: none"> ▪ autonomy ▪ expertise ▪ teamwork ▪ interdependence & coordination (i.e., Distributed Leadership (3.4.5))	
Individual practice – performed by one single person (i.e., manager)	Purposes of Hybrid Leadership (3.4.5.3) <ul style="list-style-type: none"> ▪ staff development ▪ adapting to changes ▪ reducing managers' workload ▪ minimising errors & risks 								
Collective practice – performed by most or all staff members regardless of their role, status, or position within the organisation (e.g., managers, agents)									
<u>Properties:</u> <ul style="list-style-type: none"> ▪ autonomy ▪ expertise ▪ teamwork ▪ interdependence & coordination (i.e., Distributed Leadership (3.4.5))									

Note: The findings are numbered and associated to the research questions (in blue) and the corresponding sections in the Literature Review (in green).

Chapter 6 – Conclusions, Recommendations, and Future Research

6.1 Introduction

This chapter presents the main conclusions drawn from the analysis and interpretations conducted in the previous chapter, which to allow the proposal of some recommendations for contact centres. Then, the theoretical and practical contributions of this study will be highlighted, followed by a brief description of the research limitations. Finally, potential avenues for future research on leadership in contact centres are suggested.

6.2 Revisiting the aim and objectives

The main aim of this research was to explore the leadership practices perceived and/or experienced in Scottish contact centres in order to identify the leadership theories adopted in those working environments. Having found that:

- LMX relationships are usually nurtured between staff members;
- TFL is the main individual leadership style applied by managers;
- there are differing degrees of DL implemented across contact centres; and
- there are diverse configurations of HL, whose main purpose is to enhance staff development; it is therefore assumed that the main aim of this research has been achieved.

Similarly, this research had a series of objectives to be met in order to reach its main aim:

- first, the leadership theory and research has been reviewed to further develop a critical and comprehensive overview of the leadership field;
- second, this study has provided an insight into the contact centre industry in Scotland, specifying the factors that have fuelled its development since its origins;
- third, primary data has been gathered directly from both agents and managers working at operational level in contact centres located in Scotland

in order to show evidence of the leadership practices adopted in those working environments by the key individuals involved;

- fourth, the data regarding the diverse perceptions and experiences of leadership of the key individuals involved in this research has been analysed applying a IPA (assisted by NVivo), according to the guidelines specified by that interpretive-based approach; and
- fifth, the implications from the leadership theories and approaches identified in this research have been clearly stated and recommendations have been provided to the contact centre industry based on the key findings.

In sum, it is also assumed that the objectives set for this research have also been met.

6.3 Conclusions

Following the corresponding analyses and interpretations, there are some conclusions that can be drawn from this study in relation to the key findings identified in the previous chapter. Those conclusions will be arranged according to the three key themes developed in the Literature Review chapter:

1. Leadership. Two key conclusions related to the idea of leadership can be derived from this research:

Leadership is a multi-dimensional construct. The idea of leadership that emerged from this study reveals a new notion comprised of several dimensions:

- an influence based on persuasion combined with other forms of influence, such as authority, power, and control;
- the need to achieve a goal, purpose, or outcome;
- a capacity to develop working relationships; and
- a team management capacity.

Based on those constitutive dimensions, contact centre staff members are more likely to exert an effective influence on others when (1) they use mainly persuasion along with varying levels of authority, control, and power in function of the circumstances; (2) they reach the goals set for the group; (3) they are able to develop working relationships focused on providing support and based on

mutual trust and respect with their team members; and (4) they show an ability to manage the team in the everyday work.

Leadership can be fully developed. Despite being conceptualised as an innate quality, leadership can also be entirely developed by individuals through proper training, managers’ support, and their own work and determination. Likewise, leadership is perceived as a phenomenon that can only arise naturally rather than being formally allocated; consequently, the allocation of a formal hierarchical position to an individual will not convert her/him automatically to a leader since it will not be regarded as such by others.

2. Leader. Two main conclusions can be drawn from this research in relation to the leader figure:

Leaders possess key attributes and competences. There is a series of attributes and competences (see Table 6.1 below) that comprise the requirements for a leader to be considered as such and to perform as expected in a contact centre environment.

Table 6.1: Attributes and competences

Attributes	Competences
Charisma, confidence, attitude	Knowledge and experience
Open-minded	Social and communication skills
Self-belief and determination	Adaptation capacity and flexibility
	Provision of support and motivation
	Unafraid of making decisions

Additionally, leaders also need to earn the recognition from their staff members in order to build mutual trust and respect, which contributes to create and develop their perception as leaders. The interactions involved in that process take place in a linear fashion whereby recognition leads to increasing trust and respect in the leader. Individuals need first to prove themselves in a leader’s role in order to gain genuinely the recognition, trust, and respect from others, regardless of their hierarchical position within the organisation.

Managers and leaders are different. Managers and leaders are considered to be different roles that do not necessarily complement each other. This indicates that contact centre staff conceive both roles as independent based on their

respective values, processes, and purposes, despite the fact that both roles are actually implemented on a daily basis by contact centre managers to differing degrees; however, particular circumstances in each organisation may cause the shift from one to the other. Nevertheless, staff members prefer leaders mainly because they exert an influence through persuasion rather than through authority, build more personal interactions and relationships with staff members, and can create a positive working environment. Managers, in contrast, are perceived as distant and impersonal, associated with hierarchical positions, and only concerned with task completion.

3. Leadership practice. Four leadership theories have been identified in contact centres: Transformational Leadership (TFL), Leader-Member Exchange (LMX), Distributed Leadership (DL), and Hybrid Leadership (HL). Below are the conclusions related to each of those theories.

Contact centres managers apply mainly a TFL style. TFL is widely accepted, particularly by agents, because of the importance that transformational leaders confer to inspiring and motivating staff, taking into consideration their individual needs, and enhancing their development (Bass, 1985; Burns, 1978). In contrast, transactional, passive/avoidant, and pseudo-transformational leadership styles are irrelevant in contact centres precisely because they do not concede much importance to developing positive working relationships with others and their intrinsic attitudes and behaviours often ignore or disregard the significance of trust, respect, and support in those relationships.

LMX are cultivated among managers and agents. Working relationships are built on mutual trust and respect, and aim at supporting staff members, which resonates with the central pillars of high quality LMX relationships (Dansereau et al., 1975; Dulebohn et al., 2012; Graen & Uhl-Bien, 1995; Howell & Hall-Merenda, 1999) cultivated by managers and agents at contact centres within the context of their leadership practice. This premise is consistent with the notion of leadership found in this study (i.e., *establishing working relationships* dimension) and also suggests that the development of LMX relationships among agents and managers contributes to the further development of TFL, given that the latter also involves a social exchange process; therefore, both styles support each other

(Wang et al., 2005). Both theories seem to emerge in contact centres because they have managed to complement, on the one hand, the individuals' diverse aims (through LMX) with, on the other, their collective interests (through TFL) (Anand et al., 2011; Dienesch & Liden, 1986).

DL is actively implemented in contact centres. Although the extent to which leadership is distributed varies across sites depending on the scope of individuals' autonomy, their levels of knowledge and expertise, the level of teamwork dynamics, and the degree of interdependence and coordination among staff members (Bennett et al., 2003; Gronn, 2000, 2002b), DL is actually exercised in all contact centres. Furthermore, the adoption of certain practices (e.g., rotation of the leading role in teams, allocation of leading tasks and responsibilities to agents) supports the idea that there is a systematic distribution of leadership organised at operational level in order to perform the daily work.

HL configurations pursue multiple purposes. The combination of solo leadership (i.e., leadership practice performed by one single person) and DL (i.e., leadership practice performed by several people) provides evidence of the existence of HL configurations (Gronn, 2008; 2009b), whose emergence responds to four specific purposes: (1) developing staff; (2) adapting to environmental changes to ensure work completion; (3) reducing managers' workload; and (4) minimising errors (e.g., to enhance efficiency) and risks (e.g., reducing staff turnover).

Those purposes appear to reflect the tasks and responsibilities that cause more concerns at operational level, hence the need to involve more staff members in leadership practice in order to cope effectively with them. Staff development stands out as a key purpose since it works as a platform that enables the others to be implemented.

6.4 Recommendations

There is a series of practical implications based on the key findings derived from this research, which are also organised according to the key themes discussed in the Literature Review chapter. They are directed to the contact centre

management, in general, and managers and agents working at operational level, in particular.

1. Leadership

Managers need to perform certain actions to exert effectively a leadership influence on their team members. If managers really aim at influencing their staff at work, they should use dialogue to establish communication bridges with them, and rely on convincing arguments and reliable information in order to persuade them. Managers should be aware that leadership emerges from a relational context of interactions with others where an interpersonal process of influence takes place. Thus, leadership involves a two-way interaction where individuals should try to convince others rather than imposing their views. The goal should consist of achieving a mutual understanding from both parties to work together.

Additionally, managers can use persuasion combined with authority, control, and power in certain situations (e.g., complying with internal discipline, maintaining performance standards on track) and within certain limits in order to influence their staff members. Coercion will not work and, in fact, will be counterproductive.

There are other actions that contribute to the managers' capacity to exert a leadership influence: achieving the common goals of the group, managing effectively the team (e.g., solving conflicts, allocating responsibilities), and developing relationships with their staff members (the latter discussed below in Leadership practice, p. 216).

Staff members should enhance their leadership development. Leadership is conceived primarily as an innate feature but also as a quality that can be fully developed by individuals. Agents, specifically, have the capacity to do more than answering phone calls. The evidence from this study indicates that some agents are willing to and can effectively perform more leadership tasks and assume greater responsibilities at their workplaces.

In consequence, contact centres should ensure that staff members, particularly agents, are provided with development opportunities and have access to training courses that allow them to acquire and improve their leadership capacity and thus

increase accordingly their participation in leadership practice. While this research is not focused on the potential outcomes of the leadership theories/styles implemented in contact centres, the feedback indicates that an increasing incorporation of agents into leadership practice would result in positive outcomes (e.g., higher job satisfaction, commitment, or team effectiveness).

2. Leader

Managers must possess key attributes and competences. There is a series of attributes (e.g., charisma, confidence, attitude) and competences (e.g., knowledge and experience) that any individual must be able to prove in order to perform efficiently the daily tasks and responsibilities as expected and to be regarded as a leader in a contact centre. Therefore, contact centres management should highlight the importance of those key attributes and competences as well as provide relevant training and/or leadership development programs that allow staff members to develop them.

In addition to those key attributes and competences, a leader must gain the trust and respect of their colleagues in order to be really recognised in that role. This involves a process that may require time and efforts, and proper training should be provided by contact centres for that purpose. A formally-allocated position (e.g., manager) is not considered a 'leader' position by staff members, who expect the leader figure to be able to demonstrate the attributes and competences required in order to earn that recognition.

Managers must first lead rather than manage, but should be able to perform both. Taking into account the agents' preference for leaders and managers' inclination for exercising leadership, contact centres should support and encourage their managers to adopt predominantly a leading role and to minimise managerial approaches in their daily work side-by-side with agents. To do so, managers should interact actively with their team members, use persuasion to influence them, and try to inspire and motivate them instead of (ab)using their authority and focus exclusively on performance standards. In other words, managers should have a "*human*" touch and follow a "*personal*" approach manifested in a genuine concern for people that will make agents feel more valued, close, and committed.

It is acknowledged that this initiative falls beyond the control of the managers working at operational level since they are usually put under pressure by the upper management or by the working circumstances to shift towards the managerial role, so some adjustments should be taken in that regard to avoid the potential conflict of both roles. Therefore, contact centres should provide proper training for managers to enhance their managerial and, especially, leadership skills and behaviours, and also to know when to apply one or the other according to the circumstances in order to meet the staff expectations.

3. Leadership practice

Staff members should build strong relationships based on trust, respect, and support. Contact centres management should make sure that agents and managers forge high-quality working relationships based on mutual trust and respect, and focused on providing support for each other. This may not only contribute to completing the daily work effectively but also to create a positive working environment that fosters staff interactions, communication, motivation, and engagement.

Regardless of the leadership styles implemented in the contact centre, trust and respect among agents and managers should form the building blocks of their relationships. If a leader does not gain the trust and respect from their team members, it is unlikely that they will approach her/him for enquiries. Furthermore, the lack of trust and respect will result in team members not being fully committed to the job, tasks not getting completed as expected, and customer service ultimately being affected, thus generating a chain of unwanted consequences.

Likewise, team members should continue to support each other in their daily tasks to enhance collaboration and team spirit. In this regard, it is particularly important that managers provide the support that agents need when performing their work. Agents need to know that help will be available when they need it in order to feel “safe”.

Managers should implement a TFL style. As both agents and managers prefer transformational leaders, contact centres management should provide appropriate training and development for managers to acquire the necessary knowledge and skills about how to implement effectively a TFL style. Emphasis

should be given to the development of close working relationships with agents, their personal development, and the transformational leader's capacity to inspire and motivate their team members. In addition, managers applying a TFL style should behave and conduct themselves as role models (e.g., "*leading by example*") since that is the approach that team members expect from their leader.

On the other hand, contact centres should avoid the promotion and implementation of transactional, passive/avoidant, and pseudo-transformational leadership styles. The attitudes and behaviours associated with those leadership styles are opposed to the core ideas of TFL and they are likely to cause a negative impact on staff members and team outcomes.

DL should be further developed to increase staff participation in leadership practice. Staff members, particularly agents, can and are willing to assume (extra) leadership tasks and responsibilities at operational level. Their capacity, attitude, and motivation indicates that they should get involved or even increase their participation in leadership practice. In order to do so, contact should:

- increase their levels of autonomy (based on individual skills and capabilities), either through delegation or empowerment, to make decisions about their daily tasks and responsibilities;
- stimulate participation in leadership based on individual knowledge and expertise, so an increasing number of staff members will be able to assume a leading role according to the areas in which they are proficient;
- support teamwork among staff members so that they will be willing to take the initiative more often to help each other and thus enhance collaboration within teams, which may result in synergistic dynamics; and
- develop interdependence and coordination between their members for certain leadership tasks or responsibilities (e.g., solving problems, knowledge sharing) within teams.

In doing so, staff members, especially agents, will feel that they are more involved in the work and decision-making process, and not just executing managers' instructions. In this regard, contact centres should enhance role rotation and

knowledge-sharing practices among workmates. Role rotation will help each staff member to develop their knowledge and skills while exercising a specialised leadership role within the team for a period of time; whereas knowledge-sharing practices (e.g., sharing 'best practice') will increase individuals' involvement in leadership practice by taking the initiative to communicate key data or recently-acquired knowledge to other team members.

HL configurations should be in place. HL configurations should be developed because their key purposes can lead to a series of potential advantages:

First, HL contributes to staff development: by incorporating more staff members into the leadership practice, they can enhance their knowledge and skills to further assume leadership roles. Considering the importance that staff development plays in enabling the enactment of other HL purposes, contact centres should make proper training and development opportunities available for staff to improve and put into practice their leadership skills, respectively.

Second, HL helps contact centres to adapt to environmental shifts: a greater number of staff members involved in leadership grants managers the capacity to allocate diverse leadership tasks and responsibilities to the team members whenever is needed in order to respond effectively to unpredicted and rapid changes in the working environment.

Third, HL reduces managers' workload since other staff members, mainly agents, can perform some of their daily leadership tasks and responsibilities (e.g., coaching, training, monitoring calls, attending meetings); thus, managers can focus on other tasks upon which they have exclusive responsibility.

And, fourth, HL helps to minimise errors and risks. As there are more staff members performing leadership tasks and assuming leadership responsibilities, it is more likely to detect errors in regular procedures that will eventually improve effectiveness. Likewise, giving the opportunity to staff members to be involved in leadership tends to increase their job satisfaction and commitment which, in turn, reduces the risk of turnover or absenteeism.

6.5 Theoretical and practical contributions

This research has provided two main theoretical contributions. First, it has extended the notion of leadership defined by Northouse (2015) and adopted in this study. It has been found that Northouse's (2015) first dimension of leadership (i.e., an influence based on persuasion) is also combined with other forms of influence, such as authority, power, and control. In addition, this research has added two new dimensions (i.e., developing working relationships and team management) to Northouse's (2015) definition of the concept, and found support for the goal achievement dimension. Therefore, it is possible to claim a new conception of leadership that applies specifically to a contact centre environment since it is derived from the feedback collected exclusively from staff members working in those organisations.

Second, this study has identified the leadership theories (i.e., LMX, TFL, DL, and HL) put into practice by staff members in contact centres at operational level. In doing so, the present research has extended the limited knowledge on leadership in that context, where only LMX and TFL theories/styles had been investigated (Bartram & Casimir, 2007; Bramming & Jonhsen, 2011; Huang et al., 2010; Kensbock & Boehm, 2016; Tse et al., 2013), thus addressing the need for evidence on the leadership practices implemented specifically by contact centre managers (Russell, 2008). More specifically, this study has:

- found that agents and managers develop LMX relationships based on mutual trust and respect within the context of their day-to-day working practices;
- identified TFL as the leadership style implemented by managers in contact centres (Bass, 1985; Burns, 1978), and found an association between LMX and TFL whereby the former works as a platform that contributes to fostering the latter (Anand et al., 2011; Dienesch & Liden, 1986);
- provided qualitative, empirical evidence of DL practice (to different extents in each contact centre) in a working environment different from Education or Healthcare (Gronn, 2000, 2002b), where almost all existing research had been conducted to date (Currie & Lockett, 2011; Harris, 2009; Leithwood et al., 2009a; Martin et al., 2015; Parker, 2015; Tian et al., 2015; Torrance, 2009); and

- highlighted the existence of HL configurations, whose research had been circumscribed to education environments (e.g., Collinson & Collinson, 2009; Hognestad & Bøe, 2014; Townsend, 2015), demonstrating that those are feasible in other types of organisations and in different contexts (e.g., Pugliese, 2017).

As a practical contribution, this study has extended the number of purposes behind the implementation of HL (Gronn, 2008, 2009b, 2011) in contact centres. In contrast to the main purpose stated by Gronn (2008, 2009b), i.e., adaptation to changes in the environment, this research has revealed that staff development is the key purpose that facilitates the application of the other three identified in this study: adaptation to changes, minimisation of errors and risks, and reduction of managers' workload.

6.6 Research limitations

This research has a series of limitations to be taken into account in relation to the findings and conclusions derived from it. In the first place, the ambiguous nature of the key term (i.e., leadership) may have posed difficulties for some participants to express accurately their views and perceptions. Although common ideas were identified, the perceptions of leadership were diverse and even more confusing when other terms (e.g., manager, influence, authority, and leadership practice) were introduced during the interviews/focus groups, what increased the difficulty to analyse and interpret the data.

The adoption of an Interpretivist/Constructivist paradigm and a phenomenological design with their emphasis on understanding the meaning of the social phenomena explored from the actors' perspectives, and the emic perspective that acknowledges the active role of the researcher during the research process can represent a threat to the credibility and dependability of the findings (Guba & Lincoln, 1989). In addition, as the researcher might be subject to potential bias due to the knowledge acquired from previous research within the same context, the analyses and interpretations of the data might be inaccurate or simply result in the description of a reality different from the one experienced in practice (e.g., in the observation notes), despite having applied reflexivity (i.e., critically self-reflective about own preconceptions) to avoid that situation.

Likewise, the application of a qualitative methodology and a purposeful sample implies that findings cannot be generalised to the contact centre population (Bryman, 2008; Guetterman, 2015). Although generalisation was not relevant for the present study, the findings might be transferable to other similar context or settings (Guba & Lincoln, 1989); however, the fact that the sample size was comprised of six organisations (when there are over 400 contact centres in Scotland alone) with their unique characteristics entails that the findings are context-based and may not even be relevant to all the organisations involved in the research. Thus, findings may also lack of *transferability* (Guba & Lincoln, 1989) and, consequently, the implications might not relate to all organisations.

Finally, some organisations (CCA, SDI) declined to provide further information about the Scottish contact centre industry regarding employment figures, attrition/absenteeism rates, inward/outward investments, competition, market strategies, or contribution to the local economy. This lack of key information may have impeded to build a more accurate and updated picture of the industry.

6.7 Future research

The findings and conclusions of this research allow to make some suggestions for future research on leadership in contact centre organisations.

First, the present research had an exploratory character and has not made distinctions regarding the type of contact centres involved. Therefore, it would be worthwhile to conduct research on leadership in contact centres by differentiating between in-house operations and outsourced service providers, B2B and B2C services, small and large sites, sectors served, or (non)-union recognition (Doellgast et al., 2009; Garavan et al., 2008), since such differences might influence the leadership theories/styles implemented in those organisations.

Considering the wide implementation of TFL, further research aiming at identifying the potential influence of that leadership style on individual, group, and organisational outcomes would shed some light on understanding its preference by staff members. Also, taking into account the importance of relationships for leadership development in contact centres and the suggested link between (high-quality) LMX and TFL, it would be interesting to explore in-depth the nature of

such link; for example, how high-quality rather than low-quality relationships were developed and the integration of those within the TFL style (Anand et al., 2011).

Another avenue for future research would involve applying Dulebohn et al.'s (2012) framework to explore in-depth the dynamics of LMX relationships in contact centres. While the data revealed some antecedents (i.e., trust in leader, respect and support) that enhanced the development of high-quality LMX relationships, as well as some consequences (e.g., job satisfaction, commitment, satisfaction with leader), it did not clearly exposed potential contextual variables (e.g., cultural dimensions, work setting) that are likely to form part of that process in a contact centre context. Further research might also help to extend the antecedents (e.g., affect/liking) and consequences (e.g., empowerment) to gain deeper knowledge on LMX relationships between managers and agents.

It is also recommended to conduct research aiming at identifying the factors/underlying mechanisms that may inhibit or promote the enactment and development of DL in contact centres, as well as the potential challenges involved in its implementation (Harris, 2005; MacBeath, 2005; Timperley, 2005). As it was far beyond its aim and scope, this study has not pointed out the factors that fostered and impeded the emergence/expansion of DL (e.g., organisational culture, structure, managers' role), so further research is required to learn in detail the dynamics involved in the process. Additionally, investigations focused on establishing relationships of DL with potential organisational outcomes would be useful to provide much needed empirical evidence. While there have been some appeals from DL authors to extend research in that direction (Harris, 2008, 2009; Leithwood et al., 2009c; Robinson et al., 2008), studies in contexts different from the education and healthcare industry would be even more appreciated. Given the different aim and focus of those proposed studies, maybe other research paradigms (e.g., Critical Realism, Positivism) should be considered as more appropriate for that purpose.

The existence of HL configurations offers several lines of potential inquiry. While Gronn (2011) attributed the emergence of HL to the need to adapt to the environmental challenges, this research has identified four motivations, including Gronn's. Thus, another option for future research would consist of exploring whether the purposes of HL remain the same or vary according to the

characteristics of the organisation (e.g., size, markets, industry) or the context where they are embedded (e.g., organisational structure, culture) in order to better understand the nature of HL and thus address the need for further evidence on its implementation.

6.8 Summary

This chapter has presented the key findings and implications of the research on leadership undertaken in the Scottish contact centre industry. Likewise, it has highlighted the theoretical and practical contributions to knowledge, followed by the research limitations. Finally, the scrutiny of the findings has revealed some areas of interest that have been suggested for future research on leadership in contact centres that might potentially deepen our knowledge on that topic in that particular context.

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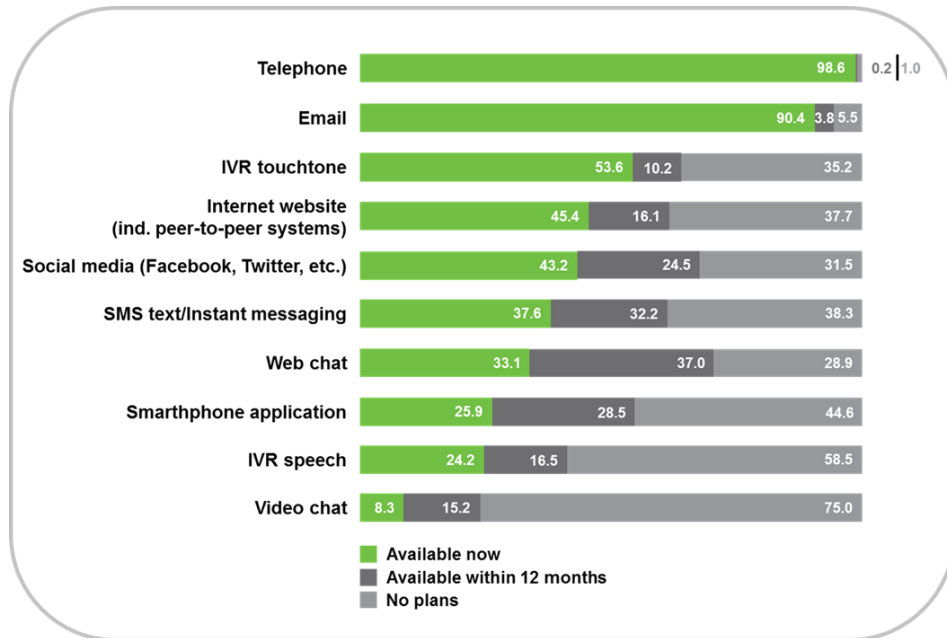
Appendix A – Context-Setting

The global & the UK contact centre industry. The number of contact centres is expanding quickly all over the world driven by companies' needs to satisfy their increasing customers' demands and favoured by global business outsourcing trends (Catalystcf, 2014; GIA, 2016; Technavio, 2016). The global contact centre market is expected to reach a staggering \$407 billion by 2022 (GIA, 2016) – growing at an 11% compound annual rate during the 2016-2020 period (rising from 8.8% during 2014-2018 and 10% during 2015-2019) – and such expansion will be characterised by the increasing use of cloud-based technology, saving investments in premises/infrastructure, and the provision of a fast and responsive customer service (DimensionData, 2016a, 2017; Technavio, 2016). Although the US is the world's market leader (44.4%), the Asia-Pacific region is forecast to experience the fastest growth at 13.3% from 2015 to 2022 driven by its status as a global leader in outsourced contact centre services (GIA, 2016).

While there has been a shift from the exclusive use of telephone towards the increasing growth of digital channels, driven by the new generations of consumers, the global industry is not equipped in the short-term to implement omnichannel capability that allows to track and store the customer journey across multiple channels (see Figure A1 below) and most contact centres do not have plans to do so, despite the fact that omnichannel digital interactions are expected to rise radically within the next two years (from 22.4% to 74.6%) and transform the industry (ContactBabel, 2016a; DimensionData, 2016a, 2017).

This imbalance implies that contact centres will need to invest in new technologies and infrastructures (e.g., mobile apps, cloud platforms, data interaction analytics) in order to adapt to their customers' increasing complex requests and communication preferences and thus avoid a “digital disruption” (DimensionData, 2017, p. 19), considering that customer experience has become the key competitive differentiator that crucially builds customer trust and promotes further loyalty (Deloitte, 2013; DimensionData, 2016a, 2017; ContactBabel, 2016a, 2016b; Hucker, 2013; ICMI, 2016; IMIMobile, 2016; Wissel, 2016).

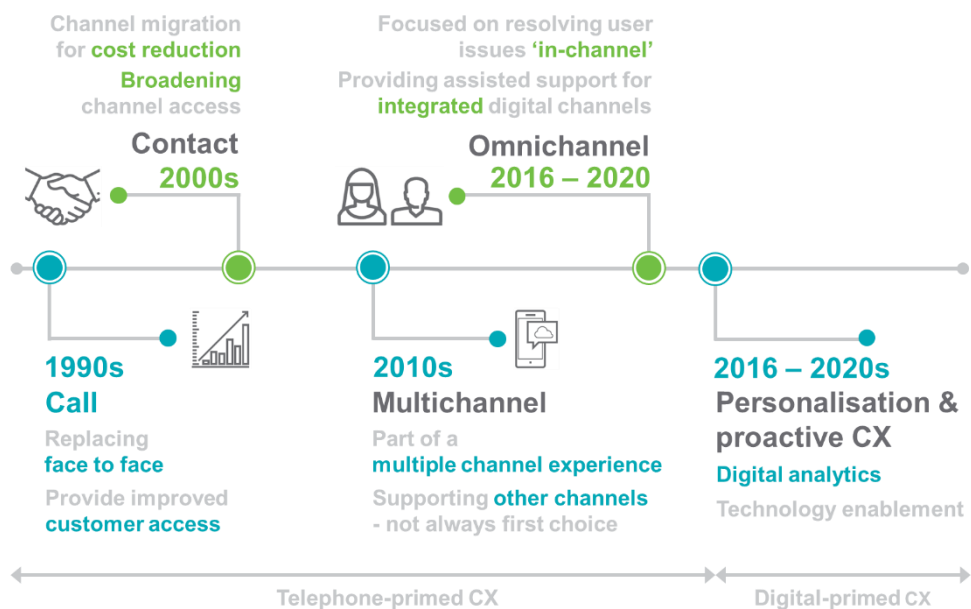
Figure A1: What channels are managed by the contact centre? Percentage of contact centres | n = 875



Source: DimensionData (2015), p. 7.

That trend is actually driving the evolution of the contact centre towards the digital age (see Figure A2). By 2017, it was expected that most sites offered an average of nine channels, including web chat, mobile apps, proactive automation, and social media, to communicate with customers, taking into account an expected increase of customer interactions, digital-assisted and digital self-service communications in the evolution of customer experience (DimensionData, 2017).

Figure A2: CX [Customer Experience] transformation: evolution of the contact centre

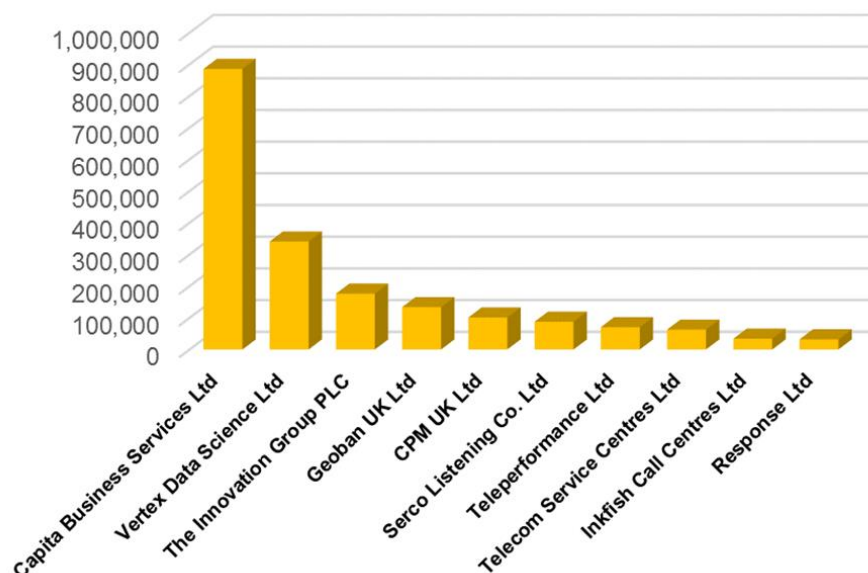


Source: DimensionData (2016a), p. 7.

According to ECCO (2014), there are almost 35,500 contact centres (81 seats on average) employing around 3.8 million people in Europe, and growing at a 3.6% annual rate. Most sites are in-house operations, while 19% are outsourcing service providers retaining over 600,000 workers. Overall, 75% focus on inbound activities, widely dominated by telecommunication, ICT and media, finance, and insurance sectors (ECCO, 2016).

The UK is by far the leading country in the European market with a workforce of over one million people of which 734,000 are agents working in 6,200 sites (122 seats on average), which means that one in every twenty-five employees is working in a contact centre, comprising 4% of the working population (ContactBabel, 2015; eRecruit, 2015). Although half of the staff work in large size sites (i.e., over 250 agents), those workplaces only represent 9% of the contact centre population, of which 16% belong to the retail & distribution sector whereas the finance sector is the largest employer, absorbing also the highest number of agents (18%) (ContactBabel, 2015). Like the rest of Europe, the UK market is led by in-house operations (65%) dealing mainly with inbound calls and providing customer services or administrative functions, and the remaining share belongs to outsourcing companies (see Figure A3), certainly attracted by one of the world's most business-friendly environments (Hucker, 2013; WorldBank, 2016).

Figure A3: The top 10 contact centre companies in the UK by turnover (£000), year ending 2011/2012

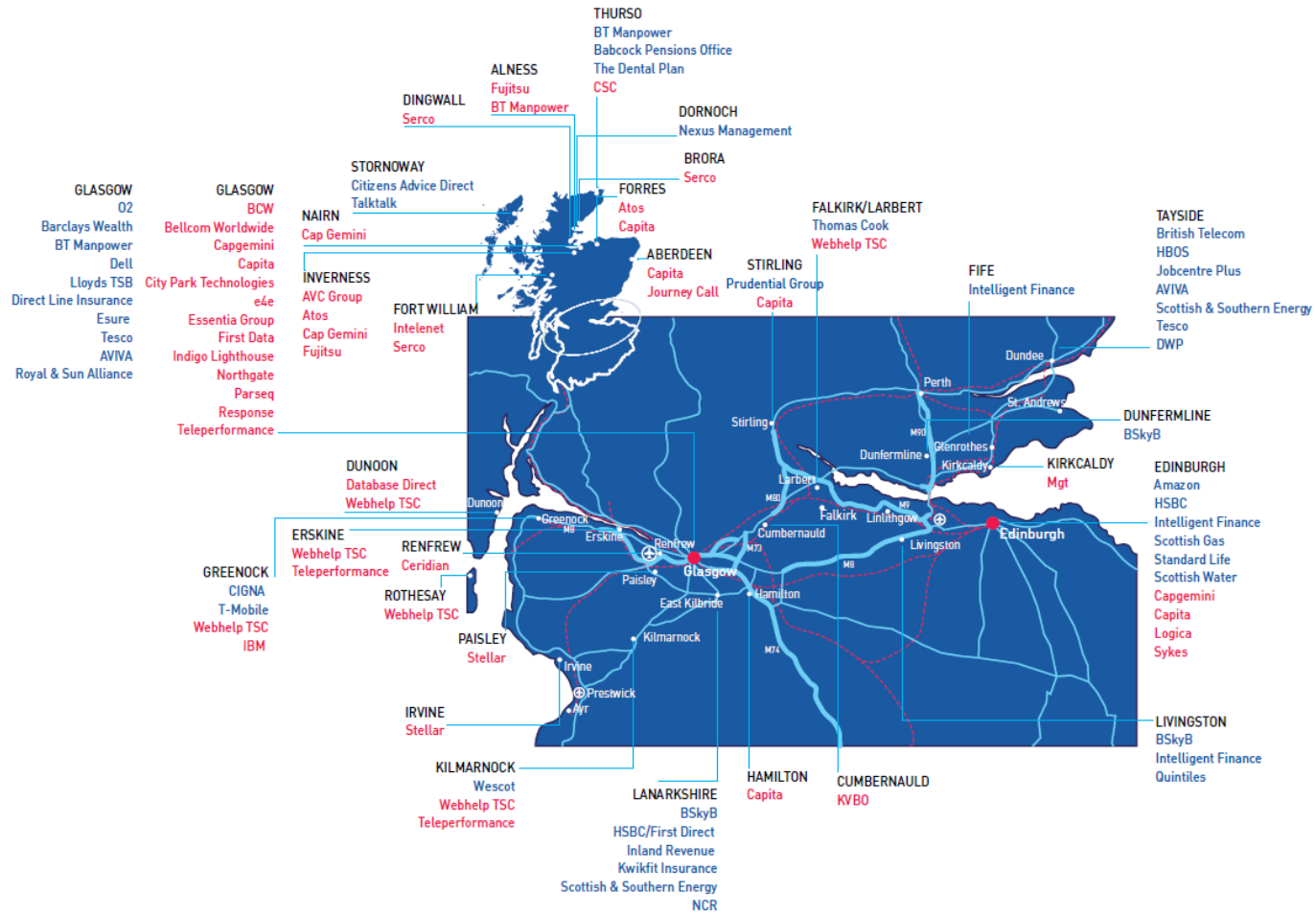


Source: Hucker (2013), p. 16.

The UK currently ranks first as the country generating the highest value added on office administrative, office support, and other business activities, although the countries with the most specialised services and the highest value added within the call centres sub-sector are Portugal and Germany, respectively (EuroStat, 2016). Following the global trends, the UK industry is increasingly using customer analytics, not only to improve customers' experience and loyalty, but also to increase revenues, reduce costs, and promote employee engagement to eventually enhance efficiency; however, it will need to quickly implement omnichannel integration with a "human touch" (DimensionData, 2016c, p. 13): i.e., offering a dynamic, well-designed, proactive, personalised customer journey supported by real-time data to adapt to customers' digitally-based interactions and increasing demand in order to remain competitive (ContactBabel, 2016b; Hucker, 2013). In 2014, the overall turnover of UK call centres amounted to £2,725m, a fourth year consecutive increase rising from £2,263m in 2013 that shows the recovery of the industry after the 2008 economic downturn. Although that figure has dropped to £2,356m in 2015, the number of contact centres has increased by 10%, showing that the industry keeps on expanding despite the fall on gross revenue (ONS, 2017).

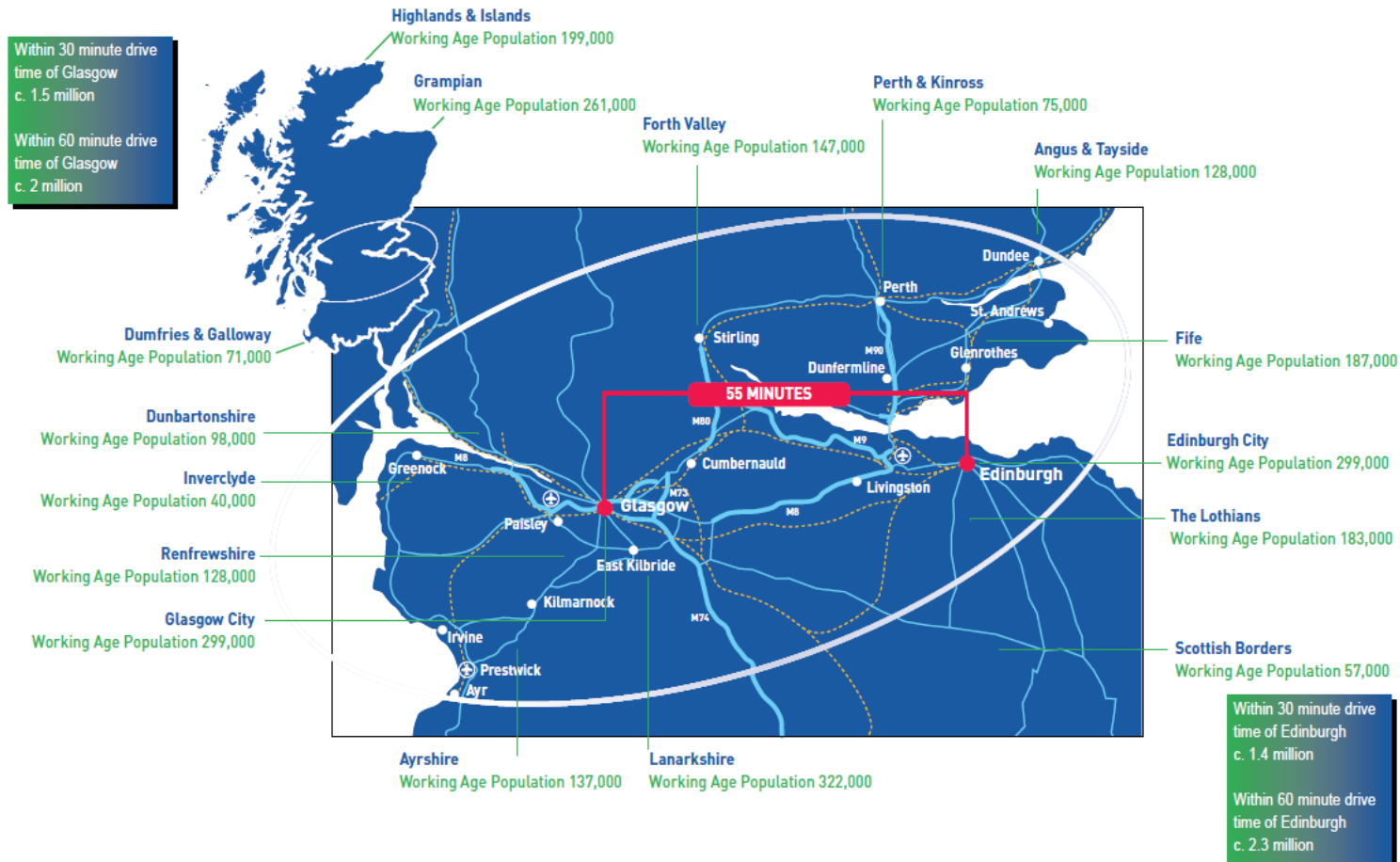
According to Xerox (2016), contact centres will disappear by 2025 due to convenience and costs. The increasing expenses of current channels (e.g., phone, e-mails, web-chat) and the failure to deliver quality services, added to the preferences of the new generations of consumers for automated systems and artificial intelligence, suggests that contact centres will be replaced by virtual assistants handling complex issues to allow companies to reduce costs and keep their customers satisfied. Those *super-agents* will provide a premium service based on fast solutions, focused on quality rather than quantity, and on relationships instead of transactions, so contact centres could potentially become a profit centre rather than a costs source.

Figure A4: Critical Mass (Outsourcing Companies are highlighted in Red)



Source: SDI (2013b), p. 5.

Figure A5: Working population in Scotland's central belt



Source: SDI (2013b), p. 8.

Table A1: Contact centres roles and salary costs within the UK

Region	New Agent
London	£20,125
South-East	£16,250
North-East	£15,357
South-West	£14,736
Wales	£14,667
North-West	£14,591
West Midlands	£14,464
East Midlands	£14,005
Scotland	£13,804
East Anglia	£13,622
Yorkshire	£13,363
Northern Ireland	£12,667
Average	£14,604

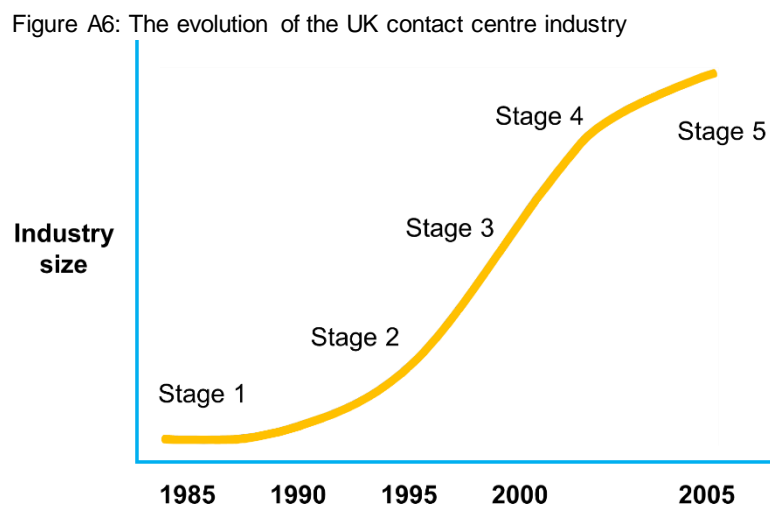
Region	Experienced Agent
London	£22,875
South-East	£18,500
North-East	£17,788
Wales	£17,667
West Midlands	£17,165
South-West	£17,058
North-West	£16,824
East Midlands	£16,548
Northern Ireland	£15,767
Yorkshire	£15,350
Scotland	£15,265
East Anglia	£15,037
Average	£16,843

Region	Team Leader Salary
London	£27,000
North-East	£23,250
West Midlands	£22,391
South-West	£22,222
South-East	£22,086
Wales	£21,667
North-West	£21,572
East Midlands	£20,964
Northern Ireland	£20,667
Yorkshire	£20,107
East Anglia	£19,313
Scotland	£18,889
Average	£21,356

Source: SDI (2011), p. 12.

The evolution of the UK contact centre industry. The factor that really propelled the industry was the deregulation of the telecommunications sector in 1984 (see Figure A6, Stage 1), leading to the emergence of market competition and reduced telephone costs. Simultaneously, the mass unemployment in manufacturing, mining, and shipbuilding in Northern England, South Wales, and Scotland, and the incorporation of women into the labour market facilitated the take-off of an industry, further enhanced by US outsourcing companies – which penetrated the UK market through acquisitions and investments – bringing new technologies and operational processes quickly adopted by the UK providers (Akroyd, Gordon-Dseagu, & Fairhurst, 2006; DTI, 2004).

Thus, the UK contact centre industry began to experience an increasing growth (Stage 2), supported by technological advances (e.g., interactive voice response, telephony-computer integration, the Internet) and further deregulations (e.g., utilities, financial services), and fuelled fundamentally by the need to provide out-of-hours services in order to satisfy the increasing customer demand while reducing costs by centralising operations (e.g., customer billing) (Hucker, 2013; DTI, 2004). Over time, many organisations began to focus exclusively on their core competences and outsource certain functions (e.g., back-office work, customer service) to specialised external service providers (e.g., BPOs, regional small operators) in order to reduce costs and increase flexibility (Stage 3), and thus triggering the emergence of new contact centres (DTI, 2004; Ellis & Taylor, 2006).

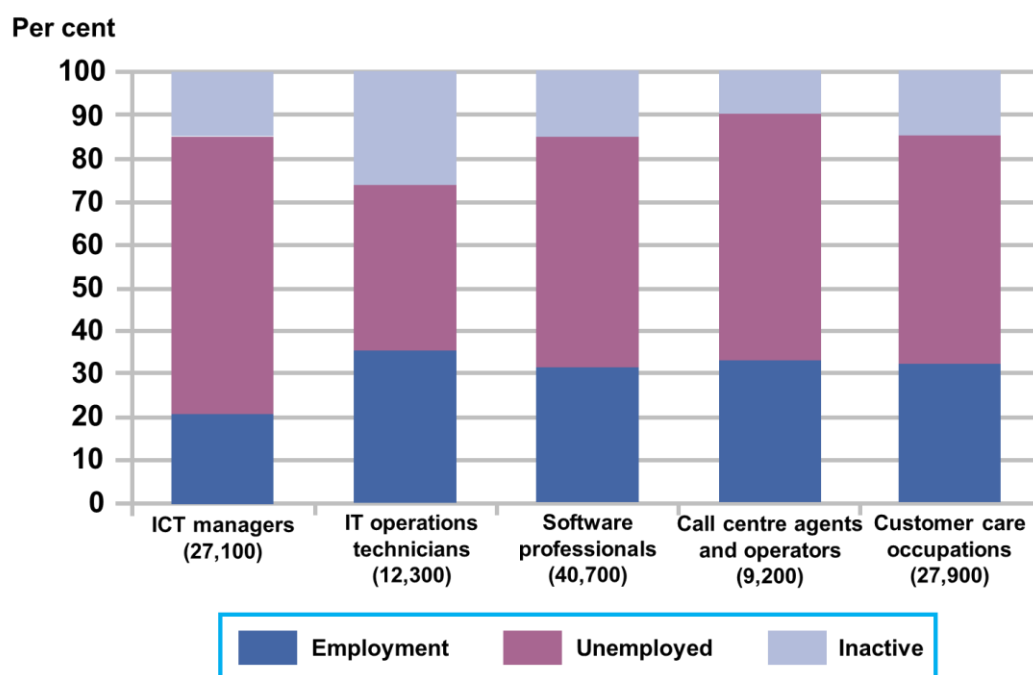


Source: DTI (2004), p. 19.

As a result, the market became saturated with third-party outsourced operators and, due to the UK economic slowdown caused by the 2001 global recession (Gongloff, 2001; UN, 2002), the prospects for growth were diminished and many operators were forced to offshore their customer services to low-cost overseas providers (Stage 4) –especially India – seeking for savings (BBCNews, 2002, 2005; EveningStandard, 2003; Khan, 2003; McGivering, 2002; Monbiot, 2003; Pike, 2000), but also causing local job losses (see Figure A7).

Since 2005 onwards (Stage 5), the industry moved towards increasing automation (e.g., web self-service) – which allowed companies to save on salaries, buildings, and infrastructure – and a focus on high-value activities (e.g., complex queries, cross-selling). Nevertheless, companies refrained from excessive automation due to customers’ demand for human interaction and the associated risks (e.g., user inexperience, outdated knowledge bases) (DTI, 2004).

Figure A7: Current economic status of people made redundant in IT and call centre occupations, by occupation^a, United Kingdom; summer 2001 to spring 2005 average



^aThe average numbers made redundant in the three months before interview are shown in brackets.

[Note: The author of the report placed call centre agents & operators and customer care occupations into the same category (i.e., call centre jobs)].

Source: ONS (2005), p. 379.

Working conditions. There is an extensive body of literature which has assessed staff well-being and job quality in contact centres; its scope does not only show evidence of the interest that the topic has generated but also of the wide range of issues identified within those working environments (Akroyd et al., 2006; Bohle, Willaby, Quinlan, & McNamara, 2011; Hannif, Burgess, & Connell, 2008; Holman, 2002).

Jobs at contact centres are generally characterised by high routinisation, low salaries and task control/job discretion, basic skills required, a lack of job variety, and limited career development (Deery, Nath, & Walsh, 2013; Gorjup & Ryan, 2008; Grebner et al., 2003; Hannif et al., 2014a; Holman et al., 2007; Murray et al., 2004; Rose & Wright, 2005; Valverde et al., 2007), in contrast to “the rosy portraits of rewarding knowledge work” described by some authors (Brophy, 2010, p. 471). In addition, contact centre workers are the most sedentary and least physically active during working hours, usually suffering from painful throat, eye discomfort, or musculoskeletal illness (Lin, Chen, & Lu, 2009; Thorp et al., 2012; Unite, 2016).

As a result of the impact from the diverse aspects of work organisation (i.e., process standardisation, performance monitoring, technological surveillance, and high workload) and customer interactions, contact centres employees tend to face high levels of stress, anxiety, fatigue, emotional exhaustion, or depression (Akroyd et al., 2006; Ashill, Rod, Thirkell, & Carruthers, 2009; Bohle et al., 2011; Deery et al., 2002; Grandey, Dickter, & Sin, 2004; Holman, 2003; Kjellberg et al., 2010; Mellor et al., 2015; Rob & Ashill, 2013; Varca, 2006; Witt, Andrews, & Carlson, 2004). Agents, in particular, report higher levels than those of other contact centre roles (Sprigg, Smith, & Jackson, 2003). Those effects are further enhanced by the exercise of emotional labour, i.e., “the process of regulating both feelings and expressions for organisational goals” that may involve “enhancing, faking, or suppressing emotions to modify the emotional expression” (Grandey, 2000, p. 95-97) and the further emotional dissonance that results in expressing more positive emotions than those actually felt in order to remain professional during the continuous interactions with customers (Mulholland, 2002; Ruppel, Sims, & Zeidler, 2013; Wegge, van Dick, & von Bernstorff, 2010).

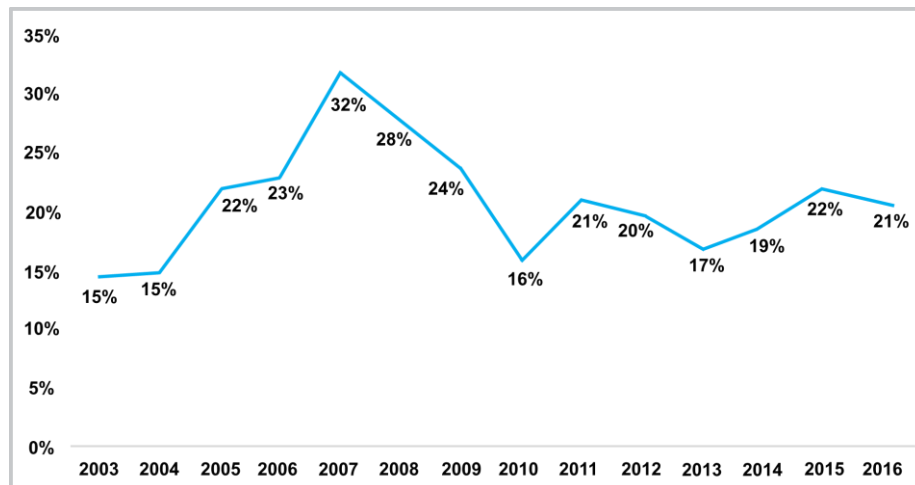
In this sense, customer interactions constitute the main source of job stressors for contact centre agents (Lin et al., 2009; Zapf, Isic, Bechtoldt, & Blau, 2003). Customers can get easily annoyed and often employ verbal abuse or aggression, rudeness, sexual harassment, or racist/xenophobic inferences to convey their frustration (Archer & Jagodziński, 2015; Dean & Rainnie, 2009; Deery et al., 2013; Grandey et al., 2004; van den Broek et al., 2008). According to Holdsworth & Cartwright (2003), contact centre agents are more stressed, less satisfied, and suffer poorer mental and physical health than the general working population; in addition, they perceived themselves as less empowered than other workers from traditional office environments. As a matter of fact, the lack of job autonomy and involvement in decision-making is common among contact centre agents, which seems to be derived primarily by the nature of the job itself but also actively promoted by management (control) strategies (Fleming & Sturdy, 2011; Jenkins & Delbridge, 2014; Townsend, 2005).

Unsurprisingly, those adverse conditions impact negatively on job satisfaction, commitment, performance, the quality of customer service provided, and the overall job quality (Dean & Rainnie, 2009; Grebner et al., 2003; Hannif et al., 2014b; Mukherjee & Malhotra, 2009; Rod & Ashill, 2013; Rose & Wright, 2005; Ruppel et al., 2013), leading consequently to high absenteeism, employee turnover/attrition, or intention to leave, especially in large outsourced sites (Deery et al., 2002, 2010; Deloitte, 2013; Grandey et al., 2004; Mellor et al., 2015; Schalk & van Rijckevorsel, 2007; Taylor et al., 2003; van den Broek, 2002). Absenteeism and attrition can easily disrupt the efficient running of daily operations and affect the level of service, providing a negative customer experience as well as increasing the stress and low morale of the rest of staff members (ContactBabel, 2016b; Ellison & Adams, 2016).

UK contact centres register a 7% absence and a 21% attrition rates on average for agents (see Figure A8 below) against a global 10% and 21.5%, respectively (DimensionData, 2016b). Half of the overall staff turnover occurs within the first ninety days of employment before returning value to the company, causing additional costs on recruiting and training new staff. In order to avoid potential losses, contact centres tend to reduce costs on training and recruitment, which usually results in employees unable to perform appropriately their respective

roles, leading eventually to higher attrition levels and a less knowledgeable workforce (CallCenterHelper, 2016; ContactBabel, 2016b).

Figure A8: Historical mean UK agent attrition



Source: ContactBabel (2016b), p. 365.

During the last few years, attrition has gradually increased and fluctuated in function of the economic recovery after the 2008 financial crisis, when levels dropped dramatically since alternative employment was not available; therefore, it is expected that attrition levels will increase as the economy grows. Nevertheless, staff turnover is a recurrent issue within the industry worldwide, which is estimated to cost UK contact centres £1bn per year (CallCenterHelper, 2016; ContactBabel, 2016b).

What also arises from all those conditions, sometimes fostered by the incapacity or negligence of managers to find solutions or exacerbated by agents' loss of identity within a new labour division (Huws, 2008; Lloyd, 2012; Stevens, 2014), is an internal conflict and further deterioration of employment relations which leads to the emergence of a collective labour resistance or "subterranean stream" (Brophy, 2010, p. 476) manifested by:

- dropping or redirecting calls, misinforming customers, or providing short answers (Kahlin & Tykesson, 2016; Mulholland, 2004; van den Broek, Barnes & Townsend, 2008);
- circumventing/manipulating surveillance systems (Bain et al., 2002; Callaghan & Thompson, 2002; Thompson, Callaghan, & van den Broek, 2004; Townsend, 2007);

- developing cohesiveness within teams for mutual support or for conducting group action (Brophy, 2010; van den Broek et al., 2008);
- rejecting management narratives (Townsend, 2005);
- forming trade unions and workers' associations (Bain & Taylor, 2000; Brophy, 2010; Tartanoğlu, 2015; van den Broek, 2004b); or
- using humour to target supervisors (Taylor & Bain, 2003b).

Those subversive actions should not only be interpreted as coping strategies for dealing with the daily work, but also regarded as a form of challenging behaviour or covert confrontation implemented by agents within their communities of practice towards the management in order to circumvent their control or ameliorate working conditions (Raz, 2007; Townsend, 2005), although their exercise may not ultimately reach their goal or improve their situation.

Thus, the overall combination of work organisation features, working conditions, and their subsequent effects (e.g., running of daily operations, low staff morale) eventually leads to the shortage of skilled staff available which – along with employee turnover and attrition levels – constitutes the other major problem within the industry (Sutherland, McTier, & McGregor, 2015). That situation forces contact centres to recruit and train new personnel, increasing their costs (Belt & Richardson, 2005; CFA, 2012; Hucker, 2013).

Training practices vary across contact centres as they are influenced by their distinctive organisational, strategic, environmental, and temporal conditions (Holman et al., 2009; Garavan et al., 2008). Due to the increasing complexity of processes, products, and services, the skills needed by employers are constantly changing (e.g., ability to shift to multi-channel platforms) and employers find it hard to recruit and train new staff, especially those with empathy and listening skills (see Figure A9 below), within a high mobility industry (Brannan, 2015; Sutherland et al., 2015).

Figure A9: Most valued characteristics and behaviours in contact centre agents



Source: ContactBabel (2016b), p. 77.

The process itself is not exempt of contradictions. Firstly, companies invest considerable time and resources in a routine job with modest pay and promotion that usually leads to high levels of labour turnover and employee dissatisfaction (CFA, 2012; ECCO, 2014; Hucker, 2013; Thompson et al., 2005); and, secondly, while recruitment focuses on identifying individuals with certain social skills and competencies (i.e., attitude, personality, communication) and training emphasises communication and quality of interactions, the management team adapt them in practice to comply with scripts and productivity targets (Callaghan & Thompson, 2002; Thompson et al., 2004; Townsend, 2005), reflecting the constant conflict between quality and quantity.

Appendix B – Properties of Distributed Leadership

The literature on Distributed Leadership (DL) has highlighted some key attributes that characterise this leadership theory (Bienefeld & Gudela, 2011; Duif et al., 2013; Gronn, 2002b; Torrance, 2013a; Woods et al., 2004) and that can actually be used as instruments to determine the extent to which the DL perspective is implemented in a particular environment.

Autonomy. Several studies have referred to autonomy as a distinctive characteristic or necessary condition in the effective implementation of DL practice (Bennett et al., 2003; Duif et al., 2013; Jones et al., 2014; Woods et al., 2004). DL enhances autonomy (Day et al., 2009) and vice-versa (Fitzgerald et al., 2013; Scribner et al., 2007); thus, the development of DL usually triggers a parallel increase in staff's level of autonomy (Mayrowetz et al., 2007; Seong & Ho, 2012).

Autonomy provides both individuals and teams with more capacity for making decisions and coordinating activities (van Ameijde et al., 2009), but it requires previous support of an organisational culture (Jones et al., 2014; Leithwood et al., 2009) and the development of trust with others to do so (Angelle, 2010; MacBeath, 2005; Tian et al., 2015). Once achieved, high levels of autonomy exert a positive influence on individuals' commitment, effort, and job satisfaction (Day et al., 2009; Hulpia & Devos, 2009; Hulpia et al., 2010).

However, autonomy – “the capacity [...] to make decisions that will lead to action and change” (Scribner et al., 2007, p. 83) – denotes an individual's power in decision-making and action that should be distinguished from empowerment – i.e., “investing in subordinates the power to make decisions” (Hairon & Goh, 2014, p. 6) – which, in contrast, involves a delegation of authority or responsibilities that emanates from a higher entity (e.g., supervisor), implying a top-down rather than a bottom-up approach (Harris, 2004; Lumby, 2003). In consequence, delegation or empowerment should not be considered as properties of DL since the delegation of responsibilities does not include the authority required to assume those responsibilities by own initiative in the first place (Bush et al., 2012; Harris, 2004; Lumby, 2003). Yet, delegation or devolution are the terms which better describe how DL is perceived in some contexts (Bolden et al., 2008a, 2009;

Gosling et al., 2009; Tashi, 2015) and it is usual to find empirical studies on DL reporting an increase of organisational members' empowerment (e.g., Davison et al., 2014; Harris, 2012; Seong & Ho, 2012) when the meaning of those concepts seems to conflict with each other, based on the distinction explained above.

Although autonomy would be more closely related to the theoretical notion of DL described by the literature (Gronn, 2002a, 2002b; Spillane, 2006), DL actually requires a balance between both approaches in order to be effective (Bolden et al., 2009). In fact, that balance reflects the relationship between those in formal leadership positions who retain certain functions and responsibilities (and delegate others), and those assuming at other levels different leadership responsibilities and roles (either delegated or performed under a certain autonomy) (Collinson & Collinson, 2009; Gosling et al., 2009; Spillane et al., 2007), which actually represent the hybrid configurations suggested by Gronn (2008, 2009a, 2009b).

Therefore, and for the purpose of this research, autonomy and delegation or empowerment will be equally considered valid instances of DL properties, taking into account that both confer organisational members the capacity for assuming more or greater responsibilities and for decision-making in order to participate effectively in leadership practice (Ali & Yangaiya, 2015; Angelle, 2010; Pedersen et al., 2011), regardless of whether that capacity is actually given or taken.

Expertise. The exercise of leadership practice based on the level of specialised knowledge or expertise constitutes one of the central attributes of DL (Bennett et al., 2003; Copland, 2003; Duif et al., 2013) which shapes the distribution of leadership within groups and organisations (Gronn, 2008; Day et al., 2009). The distributed perspective acknowledges that expertise within organisations is not concentrated on one single person but can be disseminated across an organisation (Anderson et al., 2009; Spillane et al., 2001, 2004), as it assumes that expertise is “not confined to a managerial or leadership elite” (Woods & Gronn, 2009, p. 442) and employees hold “varieties of expertise” (Bennett et al., 2003, p. 7) and different skills from which organisations can benefit whenever they are needed (Leithwood et al., 2009b). According to van

Ameijde et al., (2009), organisations' competitive advantage will increasingly rely on their ability to integrate their workforce dispersed knowledge and skills, highlighting the potential relevant role of DL in a future knowledge-based society. This comes to certify that DL "resides in the human potential available to be released in an organization" (Harris, 2005, p. 12).

The capacity for an organisation to take advantage of the staff existing expertise resides on the openness of the boundaries of DL (Bennett et al., 2003; Woods et al., 2004), which extends the opportunity for an increasing number of organisational members to contribute more actively to an organisation's operations and routines based on their relevant expertise (Leithwood et al. 2007; Fitzgerald et al., 2013) and, consequentially, to get involved in leadership practice and further enhance their professional development (Anderson et al., 2009; Day et al., 2009; Dinham et al., 2008). From that it follows that, first, formally appointed leaders need to recognise that they do not always possess the expertise required to make the right decisions and perform activities (Grubb & Flessa, 2006; MacBeath, 2005); and, second, formal leaders should locate and maximise the potential knowledge and skills dispersed among staff members within their organisations (Day et al., 2009; Harris, 2004; Leithwood et al. 2009b).

Nevertheless, DL should not be conceived primarily as a "tool to collect dispersed expertise" (Tian et al., 2015, p. 12), but as a means to develop organisations' and individuals' potential (Camburn et al., 2003; Gronn, 2000). While the enactment of leadership practice based on expertise has been generally positive (Angelle, 2010; Hudson et al., 2012; Fitzgerald et al., 2013; van Ameijde et al., 2009) and the expertise of the individuals involved complemented each other and reinforced their leadership practice (Gronn & Hamilton, 2004), there are risks (e.g., distribution of incompetence) of relying on staff members who do not possess the relevant knowledge to perform leadership tasks but hold a leadership role due to the ongoing micro-politics within an organisation (Timperley, 2005).

Teamwork. Teamwork can be defined as "the interdependent actions of individuals working toward a common goal" (Salas et al., 2015, p. 599), performed fundamentally through a set of actions and processes that implicitly denotes collaboration among organisational members (Dinham et al., 2008). To work

effectively together, team members must possess specific knowledge (e.g., own and teammates' tasks and responsibilities), skills (e.g., monitoring each other's performance), and attitudes (i.e., a positive disposition towards working in a team) (Baker et al., 2006; Bush et al., 2012). Thus, teamwork should be regarded as an adaptive and dynamic process necessary for effective team performance since it delineates how tasks and goals will be realised by team members (Salas et al., 2015).

The fact that DL is conceived as a collective phenomenon leads almost inexorably to the creation or emergence of collaborative structures to organise individuals – such as dyads (Copland, 2003; Seong & Ho, 2012), triumvirates (Gronn, 2009a; Grubb & Flessa, 2006), larger teams (Bienefeld & Gudela, 2011; van Ameijde et al., 2009), or networks (Buchanan et al., 2007; Fitzgerald et al., 2011) – that create the appropriate context that facilitates the development of teamwork (Greenfield et al., 2009; Mehra et al., 2006; Scribner et al., 2007).

The promotion of a collaborative environment among team members does not only contribute to staff development (Camburn & Han, 2009; Camburn et al., 2003), but also increases student success (Anderson et al., 2009), individuals' organisational commitment (Hulpia et al., 2010; Hulpia et al., 2012), and contributes to the development of a knowledge-sharing system (Zhang & Faerman, 2007).

Teamwork is more likely to arise in open climates in which relationships are based on mutual support and trust, fluid communication, and shared values and goals (Kimber, 2003; Woods et al., 2004). Additionally, it is required to combine individuals with strong teamwork skills (Bennett et al., 2003) and multiple and complementary expertise, skills, and resources (Fitzgerald et al., 2013; van Ameijde et al., 2009).

Interdependence and coordination. The dynamics of relationships in any type of partnership (e.g., dyads, triumvirates, groups, networks) within a DL framework are characterised by interdependence and coordination among individuals (Gronn, 2002a, 2002b).

Interdependence – “the reciprocal dependence between two or more organization members” (Gronn, 2002b, p. 432) to achieve a common purpose

(Spillane et al., 2004) – can manifest through overlapped or complementary responsibilities (Gronn, 2002a, 2002b). Overlapping roles emerge when there is a mutual need for support and information among the individuals involved (Gronn & Hamilton, 2004), which may result in:

- a reduction of decision-making errors (Leithwood et al., 2007);
- a mutual reinforcement of influence (Greenfield et al., 2009); and
- potential redundant efforts (Gronn, 2002b).

Complementary roles, in contrast, arise in situations which require a combination of skills and attributes to accomplish a task (Gronn, 2002b), which permits organisational members to benefit from their respective individual strengths (e.g., Firestone & Martínez, 2009; Hodgson et al., 1965) and improve their less developed skills and competencies through interactions and observations, leading eventually to increasing trust and peer support (Gronn, 2002b). Complementarity can adopt three possible forms (Spillane et al., 2004): when different leadership activities are performed separately but interdependently by several individuals to accomplish the same task (e.g., Seong & Ho, 2012; Zhang & Faerman, 2007); when different leadership activities are required to be performed in a certain order by several individuals to complete the same task (e.g., Spillane & Sherer, 2004); or when several individuals work simultaneously on the same leadership task by combining their respective knowledge and skills (e.g., Firestone & Martínez, 2009). The key benefit from interdependencies resides in the fact that organisational members' combined leadership activity can potentially amount to more than the sum of their individual practices (Spillane et al., 2001, 2004) – also known as the holistic view of leadership (Gibb, 1954; Gronn, 2002b). According to Leithwood et al. (2009c), high levels of interdependence lead to improvements in problem-solving, collective learning, and leadership actions.

Coordination – “managing dependencies between activities” (Malone & Crowston, 1994, p. 90) – involves the synchronisation of diverse components (e.g., staff members, tasks, resources) to be effectively accomplished (Gronn, 2002b). Several mechanisms (e.g., communication, task alignment, planning) permit to achieve coordination between activities, which relies heavily on the

exchange of information among individuals (van Ameijde et al., 2009). The capacity of patterns of leadership distribution to be productive depends largely on the degree of coordination among individuals' activities (Leithwood et al., 2007; Mascall et al., 2009). In this regard, teams characterised by coordinated-leadership structures achieve higher performance (i.e., on sales) than those with distributed-fragmented leadership structures (Mehra et al., 2006).

Some patterns of DL – such as *spontaneous collaboration* and *intuitive working relationships* (Gronn, 2000b), *collective* and *coordinated distribution* (Spillane, 2006), or *planful alignment* (Leithwood et al., 2006b) – represent instances of interdependent and coordinated actions between organisational members that respond to what Gronn (2002b, p. 429) referred to as “holistic” forms of distribution. Thus, individuals' conjoint efforts can generate synergies whose outcome is greater than the sum of their individual contributions (Gronn, 2002b), what constitutes the main advantage on maximising interdependence and coordination (Gronn, 2008).

Appendix C - Documentation

Pilot study. Taking into account the limited leadership research in contact centres, a pilot study involving five contact centres located in Edinburgh and one in the Scottish Borders was conducted in order to gain an insight into the contact centre environment and the working practices. The contact centres served customers in industries such as financial services, utilities, IT, and public services.

The pilot study was also used to test the suitability of the data collection methods (i.e., semi-structured interviews, observation) for leadership research, in general, and for answering the research questions, in particular, in order to gain a deep understanding of the topic under investigation. Likewise, feedback from the pilot study helped to further add/remove some questions in the final interview guide, but also to identify potential flaws that were consequently addressed. Thus, their relevance and clarity was tested accordingly in order to generate a trusting, clear, and comprehensive interview guide (Kalio et al., 2016).

This preliminary study consisted of twelve semi-structured interviews with six managers and six agents, who were inquired separately about some aspects of their daily work (i.e., working environment, issues and challenges, monitoring and surveillance); but, especially, about the perceived leadership approach within their respective contact centres, their views on leaders and followers, and some practices highlighted by research on leadership undertaken in diverse contexts (i.e., job autonomy, teamwork, knowledge sharing) based on an early review of the researcher.

The findings of the pilot study allowed to obtain an overall view of the working dynamics within modern contact centres (i.e., overall satisfying working environment, importance of technology, high volume-customer satisfaction incompatibility, low staff motivation, and the general indifference of staff members about monitoring and surveillance practices), but also revealed in terms of leadership:

- the existence of an open, inclusive and relationship-oriented leadership style;
- the managers' main role in supporting staff and facilitating their work;

- the general perception of managers holding the leader role;
- the agents' potential to become leaders based on the opportunities available for career development within the respective contact centres; and
- the differing degrees of job autonomy, teamwork, and networking for knowledge-sharing enjoyed by staff members when performing their jobs.

Most importantly, the pilot study helped to contemplate the feasibility of conducting a further and more comprehensive research exploring the topic of leadership in that environment.

The questions posed to managers and agents are shown below:

General Impressions

1. What is it like to work in this contact centre? For how long have you been working in this contact centre? What do you like most/least?
2. How would you describe the leadership approach in this contact centre? Could you give me some examples of how the leadership approach is implemented in this contact centre?
3. Who do you think are the “*leaders*” in this contact centre? Do you think that agents are leaders in this contact centre?
4. What do you think are the key issues and challenges for this contact centre (and for the contact centre industry in general) in terms of day-to-day operations or working practices?

Job Autonomy

5. To what extent do you think that this contact centre facilitates staff doing their work autonomously? What are the benefits and challenges?
6. What impact does working autonomously have on staff work?

Teams and teamwork

7. To what extent does this contact centre make use of teams or teamwork to carry out the daily work? How do teams work? What are the benefits and challenges?

8. What impact does team work have on individual workers and the contact centre?

Networking and Knowledge sharing

9. To what extent can staff members collaborate with others to solve problems, to develop new ideas, or to implement working practices or procedures? How do they collaborate with each other? What are the benefits and challenges?

10. How do staff share their knowledge in this contact centre?

11. What impact does sharing knowledge have on staff?

Additional question

12. Is there anything else about working in this contact centre that you would like to add?

Information Sheet for Managers

[Date]

Dear Madam or Sir,

My name is Alberto Orozco, a student at Edinburgh Napier University doing a PhD on leadership in the contact centre industry in Scotland. I write to you to ask whether you would like to participate in the research that I am currently undertaking for the completion of my doctoral degree. The nature and scope of your collaboration is explained in detail in the following lines.

As part of my project, I need to collect first-hand data from staff working in contact centres in order to find out about how leadership is conceived and the leadership approach(es) implemented in those workplaces. In order to do so, I have planned to conduct interviews with managers and focus groups with agents working at operational level, complemented with non-participant observations involving both groups.

The reason for collecting data separately from different sources and using different methods lies in two key potential advantages: (1) it is likely that the data generated will be richer and will provide more insights into the topic of investigation; and (2) it will also allow to contrast different perspectives, which, overall, may provide a better understanding about how leadership is practiced in contact centres.

The data collection can be completed the same day to minimise any disruption at work, and the date and times will be decided by you and the participants involved according to their availability. The interview and the focus group can be conducted in a room available at the contact centre in order to meet with the participants in a familiar environment and also to facilitate their attendance. As a focus group requires between four and six agents, the session can take place either before starting or after finishing their shifts, or can include only agents working just half-day or part-time (other possible alternatives can be discussed) to ensure a minimum number, and always with your previous consent.


The length of the interview with you – the manager – will be one hour approximately and the focus group with the agents will be one hour and a half to make sure that there is enough time for everyone to express their views. As to the observations, they will be split into two sessions of one hour each and will consist of looking at how agents and managers interact with each other.

The main purpose of the observations is to find out whether and how often agents and managers interact with each other during their daily work, **not to listen to their private conversations, or the agents' conversations with customers, or any sensitive information exchanged in their communications.** Those are **irrelevant** for the research.

The Interview Guide (including general questions on leadership in the contact centre), the Informed Consent Form (to be collected prior to each interview/focus group), and the Additional Information sheet (explaining the process for each data collection method) will also be sent to the agents willing to participate in order to provide all participants enough time to prepare the answers; to ensure the protection of all participants' rights; and to let them know about how the interviews, focus groups, and observations will be implemented, respectively.

All the information provided will be treated **in strict confidentiality, anonymised, and only used for academic purposes,** following the guidelines of the Code of Practice on Research Integrity of Edinburgh Napier University regarding data protection.

I believe that the topic of my investigation may also be of interest to you, as well as the findings of my research – which could potentially benefit your organisation in terms of learning about the leadership approach(es) implemented within the contact centre – so I would be pleased to make a detailed summary of the research results available to your organisation on completion of my thesis.

I would be very grateful if you could please let me know whether you would like to participate in this research. If you have any doubts or questions regarding the purpose and details of my research, please contact me directly  or contact my Director of Studies – Dr. Jackie Brodie (please see details below).

Director of Studies

Dr. Jackie Brodie [REDACTED] [REDACTED] Craighlockhart
Campus
Senior Lecturer in Entrepreneurship [REDACTED]
The Business School [REDACTED]

I am looking forward to hearing from you again.

Kind regards,

Alberto Orozco

PhD Candidate, Edinburgh Napier University Business School

Please note

If you would like to contact an independent person who knows about this project but is not involved in it, you are welcome to contact Dr. Kenny Crossan. His contact details are given below.

Independent Person	
Dr. Kenny Crossan	██████████ Craighlockhart Campus
Lecturer in Economics	██████████
The Business School	████████████████████

If you have read and understood this information sheet, any questions you had have been answered, and you would like to be a participant in the study, please now see the consent form.

Interview Guide

1. In your opinion, what do you think that leadership is in a contact centre?
 - 1.1 How do you think that leadership arises:
 - is it something innate possessed by individuals or something that can be developed;
 - is it something that emerges naturally or something that is allocated?
 - 1.2 Do you think that leadership is about authority, coercion, control, persuasion, or power; or some combination of those; or something else?
2. In your opinion, what do you think that a leader is in a contact centre?
 - 2.1 What is it required to be, become, or act like one?
 - 2.2 Do you think that leaders and managers are the same or there are differences between the two? Why?
3. In your opinion, what leadership practice(s) is/are implemented in this contact centre:
 - is it an individual practice (i.e., leadership is practiced only by one person, so she/he takes all the leadership decisions and responsibilities)? If so, who is the leader?
 - is it a collective practice (i.e., leadership is practiced to different extents by many or most of the people within the contact centre, so many leadership decisions and responsibilities are shared by or delegated to different people in teams, meetings, or when working together)? If so, who are the leaders?
 - or both? If so, what do you think it is the purpose of combining both individual and collective leadership practices?
4. Would you like to add any additional information to this interview/focus group?

Examples of Additional Questions (in Q.3)

If collective, how do you think that leadership is also exercised as a *collective practice* in the contact centre?

- does it just happen spontaneously in the day-to-day work without any planning;
- does it have to do with the working relationships of dependence with other staff members (managers or agents); your tasks complement each other, so you all end up building close working relationships and making decisions together;
- does the contact centre management organise the work in groups or creates teams for some tasks that promote collaboration and facilitate practicing leadership at a collective level;
- does the manager often allocate leadership responsibilities and tasks to some agents according to their level of experience, expertise, skills, etc.;
- is it something that forms part of the culture of the organisation, so everybody is encouraged to share, participate, delegate, empower, and interacting with each other to make decisions together; or
- do some staff members take their own initiative without the manager allocating any leadership responsibility to them; or
- something else?

If both, what do you think it is the *purpose* of combining both individual and collective leadership practices?

- do managers allocate leadership tasks and decisions to agents because that way they can reduce their workload and focus on other tasks?
- is it a way to make sure that all the daily tasks and work at the contact centre are done properly and in a timely manner, so (almost) everybody is involved in leadership to different extents either individually or collectively?

(Continued on next page)

(Continued)

- does it help to develop all the people within the contact centre, so staff members have leadership responsibilities and they learn to make different leadership tasks and decisions on their day-to-day work.
- managers allocate leadership tasks and responsibilities because that way agents get extra work and do not spend any time talking to each other or being inactive; or
- something else?

Additional Information for Managers and Agents

Below is some additional information that you need to know about the process of collecting data for interviews, focus groups, and non-participant observation sessions.

The interview/focus group will take place at a meeting room of the contact centre at a time and date decided by you/all the agents involved, and it will last for one hour approximately. Prior to the interview/focus group session, the researcher will explain briefly the research purpose, the data collection process, the confidentiality and anonymity guidelines, and will remind you of your right to withdraw at any time without further questions. The researcher will also ask for permission to audio record the interview/focus group session so that he will be able to transcribe the data that will be used for further analysis. You will also have the opportunity to pose any research-related questions or doubts to make sure that the entire data collection process is absolutely clear to you.

Once your doubts and questions have been solved satisfactorily, the researcher will collect the signed Informed Consent Form that was sent to you in advance and will provide you a signed copy for your records. The Informed Consent does not only confirm your voluntary participation in the research, but also ensures that the researcher will fully comply with Code of Practice on Research Integrity of Edinburgh Napier University to guarantee your rights, such as confidentiality and anonymity, during the whole research process.

Before starting the interview/focus group, the researcher will provide you with a copy of the Interview Guide so that you can also read the questions and plan your answers during the session. For interviews, you can take your time to express your ideas and opinions and to extend your explanations as you will be the sole participant. For focus groups, participants will be encouraged to engage themselves in a discussion, rather than answering individually to the researcher, who will only pose questions and will listen to all of you, making sure that everybody has the chance to intervene.

Please remember that there is no right or wrong answers and you do not have necessarily to agree or disagree with the other participants since the researcher is interested in your particular views, perceptions, and experiences on leadership, so you can tell what you really think about it without getting any pressure or influence from anybody.

As to the non-participant observation sessions, the researcher will follow the same procedure as with the interview/focus group to make sure that you are aware of the process, of your rights, and of the researcher's presence during the observation period. You will not be asked to do anything in particular, so the researcher will just observe for an hour approximately how you and the rest of your colleagues along with your manager interact during the performance of your daily working routines. The researcher will not interact with any of you and will not interfere at all in your work in order to minimise as much as possible the effect that his presence may have on the people observed. During the interview/focus group and non-participant observation sessions, the researcher may take some notes about something interesting/unexpected that you have mentioned during the discussion or he has observed during your working routine; but he will ask you about it later to avoid interrupting your answer or your work. You can also see those notes if you wish after the interview/focus group and non-participant observation sessions have finished.

Although the researcher will ensure the confidentiality and anonymity of the data during the whole research process, he cannot fully guarantee those standards in relation to focus groups. As participants can share the content of the sessions with other individuals outside the group, there is a potential risk that the information discussed in a focus group session may not remain confidential.

Once the data collection has been completed, the researcher will transcribe the audio file of the interview/focus group and he will send it back to you by e-mail. This is to give you the chance to review what you have said and make any modification that you wish in order to make sure that you are happy with the content of the transcript. Then, it is your turn to send the transcript back to the researcher so that he will be able to analyse all the data.

Please remember that, once the researcher has completed his doctoral degree, the audio files, transcripts, and notes of the interview/focus group and observation sessions will be removed from any electronic device (e.g., audio-recorder, laptop) or destroyed a year after the last publication that the data relates to in order to comply with the data protection regulations of Edinburgh Napier University. The researcher will also send you via e-mail a detailed summary of the research findings.

Hope that this information has been helpful to you. Thanks for your time.

Consent Form

“An exploration of leadership practices in Scotland’s contact centre industry”

I have read and understood the information sheet and this consent form. I have had an opportunity to ask questions about my participation.

I understand that I am under no obligation to take part in this study.

I understand that I have the right to withdraw from this study at any stage without giving any reason.

I agree to participate in this study.


Name of participant: _____

Signature of participant: _____

Signature of researcher: _____

Date: _____

Contact details of the researcher

Student: Alberto Orozco
School of Management
Edinburgh Napier University Business School
Craiglockhart Campus, Edinburgh EH14 1DJ


Information Sheet for Agents

[Date]

Dear Madam or Sir,

My name is Alberto Orozco, a student at Edinburgh Napier University doing a PhD on leadership in the contact centre industry in Scotland. I write to you to ask whether you would like to participate in a focus group session for the research that I am currently undertaking for the completion of my doctoral degree. The nature and scope of your collaboration is explained in detail in the following lines.

As part of my project, I need to collect first-hand data from staff working in contact centres in order to find out about how leadership is perceived and the leadership practice(s) implemented in those workplaces. In order to do so, I have planned to conduct interviews with managers and focus groups with agents working at operational level, complemented with non-participant observation involving both groups.

The reason for collecting data separately from different sources and using different methods lies in two key potential advantages: (1) it is likely that the data generated will be richer and will provide more insights into the topic of investigation; and (2) it will also allow to contrast different perspectives, which, overall, may provide a better understanding about how leadership is practiced in contact centres.

The date and time for the focus group session will be decided by all of the agents participating in it and your manager – so that all of you can discuss when it is the most convenient day and time for the session to be organised – and will be conducted in a room available at the contact centre in order to meet in a familiar environment for you and also to facilitate your attendance. As a focus group requires between four and six agents, the session can take place either before starting or after finishing your shift to avoid disrupting your work (other possible alternatives can be discussed) and thus ensure a minimum number, and always with the previous consent of your manager.

The length of the focus group with you and the other agents will be approximately one hour and a half to ensure that there is enough time for everyone to express their views, while the non-participant observation will be split into two sessions of one hour each.

If you wish to participate in a focus group session, you first need to read the Informed Consent Form (to be collected prior to each interview/focus group), the Interview Guide (including general questions on leadership in the contact centre), and the Additional Information sheet (explaining the process for each data collection method) which are attached to this e-mail (please see attachments) to make your decision. If you finally decide to participate, you will need to contact your manager to let her/him know about it so that she/he can book a place for you. Please take into account that the focus group session is limited to six agents, so you are advised to contact your manager at the earliest opportunity in order to book your place. Once the places for the focus group are completed, your manager will contact me to let me know about the dates and times decided by all of you so that I can visit the contact centre to conduct the focus group session.

All the information provided will be treated **in strict confidentiality, anonymised, and only used for academic purposes**, following the guidelines of the Code of Practice on Research Integrity of Edinburgh Napier University regarding data protection.

I believe that the topic of my investigation may also be of interest to you, as well as the findings of my research, so I would be pleased to make a detailed summary of my research results available to you on completion of my thesis. Therefore, I would be very grateful if you could participate and thus contribute to my PhD research. If you have any doubts or questions regarding the purpose and details of my research, please contact me directly [REDACTED] or contact my Director of Studies – Dr. Jackie Brodie (please see contact details below).

Director of Studies

Dr. Jackie Brodie [REDACTED] Craighlockhart Campus
Senior Lecturer in Entrepreneurship [REDACTED]
The Business School [REDACTED]

I am looking forward to hearing from you again.

Kind regards,

Alberto Orozco

PhD Candidate, Edinburgh Napier University Business School

Please note

If you would like to contact an independent person who knows about this project but is not involved in it, you are welcome to contact Dr. Kenny Crossan. His contact details are given below.

Independent Person	
Dr. Kenny Crossan	██████████ Craighlockhart Campus
Lecturer in Economics	██████████
The Business School	████████████████████

If you have read and understood this information sheet, any questions you had have been answered, and you would like to be a participant in the study, please now see the consent form.

Appendix D – Participants and Contact Centres

Participants. Table D1 below shows the codes assigned to each research participant (numbers) and each contact centre (letters), so that both can be related to the quotations placed in Chapter 5. In addition, it also displays the number of participants from both positions and their working experience.

Table D1: Participants' positions and working experience in each contact centre

Contact Centre A			
Position	Experience	Position	Experience
Manager 1	2 years, 6 months	Agent 1	2 years, 3 months
		Agent 2	2 years
		Agent 3	6 months
		Agent 4	2 years, 6 months
		Agent 5	2 years, 6 months
Contact Centre B			
Position	Experience	Position	Experience
Manager 2	4 years	Agent 6	2 years
Manager 3	4 years, 6 months	Agent 7	7 months
Manager 4	22 years	Agent 8	5 years
		Agent 9	1 year, 3 months
		Agent 10	3 years
		Agent 11	1 year, 6 months
		Agent 12	1 year
Contact Centre C			
Position	Experience	Position	Experience
Manager 5	4 months	Agent 13	10 months
		Agent 14	9 months
		Agent 15	10 months
		Agent 16	10 months
Contact Centre D			
Position	Experience	Position	Experience
Manager 6	1 year	Agent 17	1 year, 6 months
		Agent 18	14 years
		Agent 19	9 months
		Agent 20	3 years

(Continued on the next page).

Table D1: Participants' positions and working experience in each contact centre (continued)

Contact Centre E			
Position	Experience	Position	Experience
Manager 7	3 years, 3 months	Agent 21	16 years
Manager 8	5 years	Agent 22	1 year, 1 month
Manager 9	3 years	Agent 23	1 year
		Agent 24	15 years
		Agent 25	11 months
Contact Centre F			
Position	Experience	Position	Experience
Manager 10	25 years	Agent 26	8 years
		Agent 27	2 years, 2 months
		Agent 28	9 years, 5 months
		Agent 29	1 year
		Agent 30	15 years
	Average: 5 years, 9 months		Average: 3 years, 6 months

It should be noted that the working experience of most participants is higher than that is shown in Table D1 due to their past jobs in other contact centres; however, only their experience in their present employment was considered since their views on leadership only applied to their current positions in their workplaces.

Contact Centres. Specific information about each contact centre has been placed in Table D2 below in order to show the diversity of the organisations involved in the research.

Table D2: Contact centres characteristics

	Contact Centres					
	A	B	C	D	E	F
Type	In-house operation	Third-party operation	Third-party operation	In-house operation	In-house operation	In-house operation
Size*	150	790	19	110	750	720
Service	Inbound	Inbound	Outbound	Inbound	Inbound	Inbound
Sectors	Financial services	Technology, Financial services, technical support, retailing	Technology	Utilities	Utilities	Telecom, media
Location	Edinburgh	Edinburgh	Glasgow	Edinburgh	Edinburgh	Livingston

*Number of agents.

Appendix E – Examples

Figure C1: Example of *annotation* (bottom right) linking fragments from interviews and focus groups (highlighted in blue) to non-participant observation notes

The screenshot displays a software interface for managing data nodes and annotations. On the left, a sidebar contains navigation options: Nodes, Cases, Relationships, Node Matrices, Sources, Nodes (selected), Classifications, Collections, Queries, Reports, and Maps. The main area features a search bar and a table of nodes.

Name	Sources	References
1. Leadership	0	0
2. Leader	0	0
Managers	5	6
Agents	5	12
Qualities	0	0
Individual traits	0	0
Abilities & skills	0	0
People-oriented & commu	7	32
Adaptation capacity & flexi	5	5
Support & motivation	4	4
Decision-making	2	2
Recognition, trust, and respect	10	28
Deceptive and manipulative	1	6
Transformational Leadership	0	0
Transactional Leadership	0	0
2.1 Be, Become, Act (as individual c	0	0
2.2 Managers & Leaders	0	0
3. Leadership practice	0	0
4. Leadership approach	0	0
Emerging themes	0	0

The annotation window on the right shows a text snippet with highlighted phrases: "Agent 4: I think that **having that support there**, as well. It's always good to know that you got it in case that anything like that arises and you know that there is someone right there who is going to take an interest in you and **really going to help you**. A good leader is going to do that." Below the text, a link is shown: "<Internals\WRBS Manager 1> - \$ 1 reference coded [5.50% Coverage]". A reference is also listed: "Reference 1 - 5.50% Coverage". The annotation content is: "I had leaders in the past that they've really just been focused on them becoming the best – when I was working on a sales-orientated position I was in – and it was always 'how many sales have you done? How many sales have you done?' There was nothing there to sort of inspire me and coach me to be better or more about 'what can we do to make that person better?', and I think that was a bad leader, whereas what I try to do is to help [and] inspire my members of staff to reach their full potential."

At the bottom of the annotation window, there is an "Annotations" table:

Item	Content
1	Observation notes: "The managers also sit in a working station along with the agents, doing their job, and helping to answer questions/doubts to the agents, who ask them from the distance or just get up and go whenever they are. The managers' function seems to be far away from monitoring purposes and rather for providing direct support".

Figure C2: Example of *annotation* (bottom right) linking fragments from interviews and focus groups (highlighted in blue) to notes taking during the sessions

The screenshot shows a software interface with a sidebar on the left containing navigation options: Sources, Nodes (selected), Classifications, Collections, Queries, Reports, and Maps. The main area is titled 'Nodes' and features a search bar with 'Look for' and 'Search In' dropdowns, and buttons for 'Find Now', 'Clear', and 'Advanced Find'. Below the search bar is a table with columns 'Name', 'Sources', and 'References'.

Name	Sources	References
1. Leadership	0	0
2. Leader	0	0
3. Leadership practice	0	0
Individual	0	0
Managers	2	3
Agents	3	8
Individual & Collective	0	0
4. Leadership approach	0	0
Emerging themes	0	0

On the right, an 'Agents' window is open, displaying a text snippet with several lines highlighted in blue. Below the text, there are two reference entries: 'Reference 4 - 0.32% Coverage' and 'Reference 5 - 0.39% Coverage'. At the bottom, an 'Annotations' table is visible.

Item	Content
1	Based on the voice tone and body language of this agent when she/he was describing the attitudes and behaviours of some managers, it was evident that she/he did not like it at all. Actually, the rest of the participants also made assertive comments and did gestures with their heads and/or hands during her/his intervention to show their agreement with her/his colleague's views and that they did not like either those attitudes and behaviours in a manager.

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