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How to cite this thesis
A QUALITATIVE STUDY OF LEADERS’ WORK IDENTITY IN OUTSOURCED PROJECTS

by

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UNIVERSITY OF JOHANNESBURG

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Co-supervisor: Prof Willem Schurink

Date: May 2018
DECLARATION BY CANDIDATE

I hereby declare that the work presented in this dissertation for the degree of Master of Philosophy (Personal and Professional Leadership) at the University of Johannesburg, is my own original work and that I have not previously in its entirety or in any part submitted it at any university for a degree. I further declare that all sources cited or quoted are indicated and acknowledged by means of a comprehensive list of references.

L. Lategan
Date: 14/05/2018
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ABSTRACT

Orientation
The study explored the experiences of ten information technology (IT) project- and programme managers who led outsource projects. It explains the complex nature of outsourcing and requirements in leading inter-organisational teams. Implementation of these outsource projects is often concluded with varying degrees of success, and poor results lead to loss of income, reputation, and intellectual property, which impact people’s work identity. The study focused on the roles these leaders have to fulfil, what motivates them, and personal attributes required to deliver successful outcomes. Finally, the strategies and competencies the project- and programme managers developed to form and maintain their work identity are also discussed.

Research purpose
The purpose of the study was to explore the work identity of leaders working in complex inter-organisational structures through outsource arrangements.

Motivation for the study
The study was motivated by my own experiences as an IT project- and programme manager leading outsource teams. More specifically, I wanted to explore my observation of leaders having various levels of success in delivering projects. In addition, I was curious about how they managed themselves and what motivated them. Lastly, I wanted to know how they managed team viability within a complex inter-organisational team, creating an environment where team members wanted to work together on future projects.

Research design
A qualitative grounded theory research design was employed. Convenience- and snowball sampling were used in selecting ten research participants. Data was collected, first, by conducting interviews asking open-ended questions, followed by semi-structured interviews to clarify the participants’ everyday experiences. Finally, the interviews were transcribed and, with the aid of computerised qualitative data analysis software (ATLAS.ti), thematic data analysis was undertaken.

Research findings
The findings identified seven themes related to leaders building and maintaining their work identities. This informed a conceptual model of leaders’ work identity within an
outsourcing context. Three themes centred around a leader’s profile: roles, motivation and leadership traits. Their work identity was enhanced through competencies the leaders had acquired through years of experience. These included industry knowledge, business skills, a global mind-set, and interpersonal skills influencing expression of work identity at social and structural levels. Finally, as shown in the leaders' work identity profiles, competencies influence and build on one another, allowing the successful negotiation of outsource projects.

**Practical implication**
Using the Leaders' Work Identity Profile and Competencies Model could assist organisations in selecting candidates to lead outsource projects.

**Key words:** leadership, outsource projects, work identity, leadership role, leader profile, industry knowledge, business skills, global mind-set, interpersonal skills, qualitative, grounded theory
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<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
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<tr>
<td>APA</td>
<td>Association of American Psychologists</td>
</tr>
<tr>
<td>ATD</td>
<td>Association of Talent Development</td>
</tr>
<tr>
<td>BA</td>
<td>business analyst</td>
</tr>
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<td>BAU</td>
<td>business as usual</td>
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<tr>
<td>CQ</td>
<td>cultural intelligence</td>
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<td>DMIS</td>
<td>Developmental Model of Intercultural Sensitivity</td>
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<tr>
<td>EQ</td>
<td>emotional intelligence</td>
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<tr>
<td>EQ-i</td>
<td>Bar-On Emotional Quotient Inventory</td>
</tr>
<tr>
<td>FTE:</td>
<td>full-time equivalent (measurement indicating the work load of one person) (Web Finance Inc, 2017)</td>
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<td>GLOBE</td>
<td>Global Leadership and Organizational Behaviour Effectiveness</td>
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<td>GMI</td>
<td>Global Mind-set Inventory</td>
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<td>IC</td>
<td>intellectual capital</td>
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<td>IT</td>
<td>information technology</td>
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<td>LMX</td>
<td>leader–member exchange</td>
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<td>LOC</td>
<td>locus of control</td>
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<td>PC</td>
<td>psychological capital</td>
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<td>PM</td>
<td>project manager</td>
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<td>OCM</td>
<td>organisational change manager</td>
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<td>ROR</td>
<td>rate of return</td>
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<td>SC</td>
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CHAPTER 1: CONTEXTUALISING THE STUDY

1.1 INTRODUCTION

In this chapter, I contextualise the study. More specifically, I describe how my experience as a project leader working in an information technology (IT) outsource environment, led me to choose outsourcing as a research topic. Also, I outline outsourcing, its related terminology, outsource agreements, team composition, the role of leaders, and how organisational structures influence leaders' work identity. Finally, I offer the study’s research problem, the research questions, its purpose statement, and its anticipated contributions.

1.2 BACKGROUND TO THE PROBLEM

My personal experiences as a project leader working in an IT outsource environment led to the idea for this research. My outsource engagements included acting in leadership roles, representing either the client or the vendor, in delivering various outsource projects. Having been part of numerous complex inter-organisational teams, I noticed that projects or programmes were delivered with varying levels of success. I also observed differences in leaders' work experience, their behaviour, and work ethics, and how these influenced team cohesion. Being an integral part of the qualitative research process and construction of knowledge, I offered my reflections throughout\(^1\).

1.2.1 Outsourcing

In order to remain competitive and keep up with fast-moving technological advances, organisations may decide to outsource their non-core competencies, of which certain IT functions are an example (Dolgui & Proth, 2013; Mani & Barua, 2015; McKendrick, 2013; Nooteboom, Berger, & Noorderhaven, 1997; Prahalad & Hamel, 1990; Quinn & Hillmer, 1994). The practice of outsourcing began in the 1970s, when organisations began to outsource the manufacturing of products with low value-add, such as electronics and fabrics. In the 1980s, outsourcing was expanded to motor vehicle parts, with the 1990s seeing the inclusion of products and services with high added value, such as software and medical equipment (Dolgui & Proth, 2013). Outsourcing allows organisations to share fixed costs and the risks of development, enabling them

\(^1\) Also, please see Section 5.8
to enhance their own core competencies and increase project delivery (Davies, 2015; McKendrick, 2013; Prahalad & Hamel, 1990).

The outsourcing of non-core competencies is defined as “the act of obtaining semi-finished products, finished products or services from an outside company if these activities were traditionally performed internally” (Dolgui & Proth, 2013, p. 6770). In the present study, the organisation buying the service is referred to as the client, whilst the organisation providing the service is referred to as the vendor or partner (Nesheim & Hunskaar, 2015). A particular leadership challenge when outsourcing is managing complex inter-organisational relationships to deliver a service or project, whilst at the same time managing risk and delivering quality outcomes or deliverables according to a predetermined set of requirements, as stipulated in the contract.

Outsourced projects often fail due to the complex nature of the contract deliverables and the client–vendor relationship (Brown, 2015; Cowen & Hodgson, 2015; Mani & Barua, 2015; Yang, Wacker, & Sheu, 2012). Project failure includes non-delivery on a prescribed scope of work, mismanaged expectations, and a misunderstanding of the various roles and responsibilities. Reasons for the failure of outsourced projects may relate to a low level of commitment to the work by the outsource partner whilst working with other suppliers in the arrangement. In addition, the client may have a different understanding of outsourcing and a lack of maturity in managing project expectations and outcomes.

1.2.2 Realising outsource agreements and team composition

The delivery of outsourced agreements is often executed as projects, with success measured in terms of budget and delivery of the scope within a specific timeframe, and the mitigation of project risks (Archibald, 2003). The composition of outsourced project teams is normally a complex mix of resources from both the client and vendor (Davies, 2015; Mani & Barua, 2015; McKendrick, 2013; Nooteboom et al., 1997; Simchi-Levi, Kaminsky, & Simchi-Levi, 2004), with vendor resources often located in different locations or regions and time zones to those of client resources (Simchi-Levi et al., 2004). In addition, the vendor could subcontract other parties to deliver specialised tasks (Simchi-Levi et al., 2004), adding to the team’s complexity. To be successful in delivery, a project- or programme leader must build and maintain team effectiveness and cohesion throughout the project’s life cycle.

Figure 1 illustrates an example of the composition of an inter-organisational team, which includes the client’s project team, intra-organisational stakeholders, and the
vendor team, with the IT project situated within the client’s IT department. The project has a management sponsor, and is delivered by the client’s project- or programme manager, who leads the client’s project team. People within the project team may work on the project for the entire project life cycle or during certain phases of the project. An example is where an architect may only be involved during the design phases and then again intermittently during project reviews, or when changes in the scope of the project require further design. The organisational change manager may only join the team at a later stage in the project life cycle. These additions and departures influence team formation and viability maintenance.

Upon completion of the project, the service is handed over to a business-as-usual (BAU) function, which could be jointly employed by client- and vendor organisations. To add to the complexity of a team’s composition, the project team interacts and depends on other business competencies or departments within the client’s organisation, such as a supply- or legal department. The client’s project- or programme manager, who in this study is interchangeably referred to as the leader or PM, interacts with the vendor manager and vendor resources. A combination of people fulfilling various roles forms the inter-organisational project team.
Although the formal outsourcing contract forms the basis of the agreement and is used for management and governance (Davies, 2015; Jiang, Reinhardt, & Young, 2008; Yang et al., 2012), it is difficult to clearly delineate and identify all the services in the contract (Davies, 2015; Nooteboom et al., 1997). Diversity in the personalities of team members, individual strengths and weaknesses, and cultural and language differences are significant considerations in the planning and execution of the project, and can affect the outcome. An example of such considerations is the difference in time zones and the number of overlapping working hours in facilitating a continuous and timeous flow of conversations. It is therefore often posited that good communication, management of expectations, trust, commitment, common interests, and the ability to adopt more flexible business processes are essential to the success of outsourced arrangements or projects (Davies, 2015; Mani & Barua, 2015; McKendrick, 2013; Nooteboom et al., 1997; Yang et al., 2012).

In my experience, failed outsourced IT projects not only affect the organisation’s end users, but also business processes, resulting in an associated potential loss of organisational revenue. Furthermore, failed projects create distrust and affect the reputations of organisations’ departments, as well the perceptions of each other of the
various parties in the outsourcing arrangement. On a personal level, these failed projects could affect the self-worth, work satisfaction, and work identity of employees.

1.3 ROLE OF LEADERS IN OUTSOURCING

The role played by the leader is multi-faceted, and is defined in terms of hard and soft deliverables. Hard deliverables include various aspects, namely defining the project, setting goals, team-building, planning, scheduling and budgeting, controlling work and costing, and measuring the deliverables, which include quality, knowledge, and procurement management (Archibald, 2003; de Carvalho, Patah, & de Souza Bido, 2015). Soft deliverables relate to facilitating team interaction by building interpersonal relationships and team motivation whilst negotiating the vendor’s organisational culture. It also relates to the ability to influence and negotiate changes to project deliverables.

In managing complex inter-organisational interpersonal relations, leaders are expected to adjust their management style, select appropriate mechanisms to manage risks, and optimise opportunities (Davies, 2015; Jiang et al., 2008; Nooteboom et al., 1997; Wang, Chen, Wang, & Su, 2010; Yang et al., 2012). Leaders are also expected to maintain team members’ identity (Hodgson & Paton, 2016). Due to complex inter-organisational team structures, outsourcing requires continuous intervention of human intelligence, which cannot be surmised by a process or a stagnant set of rules (Dolgui & Proth, 2013), but requires constant relationship management and conflict resolution (de Carvalho, 2014; Hodgson, Paton, & Cicmil, 2011; Rauniar & Rawski, 2012). Due to the fast-paced nature of projects and the associated risks, interpersonal aspects are often neglected (Cowen & Hodgson, 2015).

In this outsourced project environment, the leader is the glue between the respective organisations, and has to negotiate tangible and intangible tasks while anticipating what lies ahead. The leader can be likened to a tango dancer — continuously twisting, turning, and changing direction in order to deliver while maintaining the motivation of team members.

Having contextualised outsourcing as the area of interest in the present study, we now proceed to the research problem, specifying the particular aspects of outsourcing I want to study.
1.4 THE RESEARCH PROBLEM

In the outsourcing environment, the leader provides the team with direction and motivation, and is the link between a client, middle management of both parties, and the vendor (Archibald, 2003). Due to complexities in the work environment and role expectations, one may assume that this affects leaders’ work identity. I assumed that these complexities have an effect on how a leader perceives his or her role, motivates teams, and manages stakeholder relationships in delivering project outcomes (Walsh & Gordon, 2008). In the outsource environment, project managers (PMs) are required to partially identify and understand the vendor’s organisational culture, which could influence his or her own sense of belonging with the client’s organisation and the relationship with stakeholders. Also, a PM may positively identify with the client’s organisation, which could lead to him or her creating in-groups and out-groups within client- and vendor teams. This could affect the PM’s behaviour in his or her interactions with team members and in fulfilling leadership roles with the vendor, which may, in turn, impact relationships between the “supervisor” (client) and “subordinate” (vendor), which has been shown to predict work identity (De Braine, 2012).

1.5 PURPOSE STATEMENT AND RESEARCH QUESTIONS

The purpose of the study will be to explore and describe the work identity of leaders working in complex inter-organisational structures through outsourcing arrangements.

Three research questions arose from this central thrust of the research, namely:

- What is the identity of project managers in inert-organisations outsourced projects?

1.6 ANTICIPATED CONTRIBUTIONS OF THE RESEARCH

I believe that an explorative and descriptive study of the work identity of PMs working in outsourcing arrangements within complex inter-organisational structures will be invaluable. In particular, I anticipate contributions on the following two broad levels:

---

2 The client’s project- or programme manager, who in this study is interchangeably referred to as the leader or PM,
1.6.1 Practice

Insights into the work identity of leaders that is suitable to the culture of an organisation would assist organisations in appointing suitable leaders for inter-organisational projects or programmes.

1.6.2 Theory

The study will add to the body of knowledge of leaders’ work identities within complex inter-organisational structures by presenting a conceptual framework of leaders’ work identities based on the integration of first-order constructs with relevant theoretical constructs (second-order constructs) (Schütz, 1962).

1.7 OUTLINE OF THE DISSERTATION

This chapter (Chapter 1) contextualised the study by addressing the following points:

- my experience as a project leader working in an IT outsource environment, which led me to choose outsourcing as a research topic;
- outsourcing, the related terminology, the realisation of agreements, team composition, the role of leaders in outsourcing, and how organisational structures influence leaders’ work identity; and
- providing an outline the study’s research problem, the research questions, the purpose statement, and the study's anticipated contributions.

The remainder of the dissertation is structured as follows:

- Chapter 2 outlines the research approach and methodology of the study, introducing the reader to the research.
- In Chapter 3, I present my findings regarding leaders’ work identity. It includes aspects influencing leaders’ work identity and strategies to maintain work identity whilst negotiating complex inter-organisational structures.
- Chapter 4 provides a synthesis of the findings and related extant literature.
- Chapter 5 concludes the dissertation with an overview of the study’s key insights and the associated theoretical and practical implications and contributions. The chapter also provides an assessment of the study in terms
of trustworthiness in terms of credibility, dependability, and transferability, and confirmability. Its most noticeable limitations are indicated, and suggestions are offered for future research.
CHAPTER 2: RESEARCH APPROACH AND METHODOLOGY

2.1 INTRODUCTION

In this chapter, the focus is on the research approach and methodology used in the study. It outlines the reasons for opting for qualitative research, the underpinning research philosophy and research strategy, and key decisions taken during the research process.

2.2 RESEARCH APPROACH

Unravelling, describing, and reaching an understanding of people’s experiences and viewpoints of some facet of social life requires a research approach that will enable the researcher to capture the richness of their world. Patton (2002), amongst others, indicated that qualitative researchers strive to provide an in-depth description of people’s subjective and experiential world, which is why I decided to employ this approach in the present study.

As Schurink, Fouche, and De Vos (2011) pointed out, qualitative inquiry is suited to studies in many disciplines, such as anthropology, sociology, education, psychology, medical science, social work, communications, and organisational studies, and is an ever-evolving field (Denzin & Lincoln, 2005).

The following are two broad definitions of a qualitative inquiry:

- “Qualitative research is a situated activity that locates the observer in the world… This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them” (Denzin & Lincoln, 2005, p. 3).

- “Qualitative inquiry is primarily naturalistic, interpretive and inductive. By studying naturally occurring phenomena, qualitative researchers attempt to interpret or make sense of the meaning people attach to their experiences or underlying a particular phenomenon” (Mayan, 2009, p. 11).

Since qualitative research is applied in many disciplines and study areas with various underlining assumptions, it is essential that researchers examine their foundations and research philosophy before embarking on a study (Eriksson & Kovalainen, 2008; Schurink, 2009).
2.3 RESEARCH PHILOSOPHY

Ontology and epistemology are fundamental considerations in a qualitative study. I therefore state my position regarding these concepts below.

**Ontology** refers to the assumptions we make about reality, influenced by our worldview, ideas, and beliefs. It includes how we experience or view relationships between people and how we make sense of the world in which we live (Corbin & Strauss, 2008; Eriksson & Kovalainen, 2008; Saunders, Lewis, & Thornhill, 2009). Using the continuum described by Morgan and Smircich (1980), I positioned myself as an interpretivist viewing social reality as a social construct. Interpretivism and constructivism depart from a detached, objective position, where the social world exists independently of people and their actions, and instead assumes that social reality is subjective and represents constructions of people who attach meaning to their world (Eriksson & Kovalainen, 2008).

**Epistemology** is described by Schwandt (2007, p. 87) as “the study of the nature of knowledge and justification.” As Eriksson and Kovalainen (2008), Mertens (2013), and Saunders et al. (2009) noted, it includes the researcher’s assumptions concerning the nature of knowledge and how it could be generated. In line with my interpretivist stance, my epistemology is that people give meaning to their situation through their lenses, and that the researcher’s personal views and beliefs invariably add to the construction of knowledge (Bryant & Charmaz, 2012; Charmaz, 2014; Eriksson & Kovalainen, 2008; Saunders et al., 2009).

In the present study, I believed that the interpretive paradigm would best assist me in gaining an in-depth understanding of how leaders create and maintain their work identity whilst leading complex inter-organisational teams in interacting with stakeholders at various levels of the organisations (Terre Blanche, Durrheim, & Painter, 1999).

2.4 THREE KEY ISSUES TO CONSIDER WHEN CONDUCTING QUALITATIVE RESEARCH

Having outlined my research philosophy, I now focus on three critical decisions that must be taken when conducting qualitative research:

i) using the existing literature,
ii) linking theory and research, and

iii) upholding research ethics.

2.4.1 The use of literature in qualitative research

There is much debate and controversy regarding the place and role of literature in qualitative research. Some writers have argued that reviewing the literature assists the researcher in demarcating research gaps in current knowledge, formulating research questions, framing the research strategy, and making sense of data. However, others believe that a literature review should be avoided, because it contaminates data emerging from the social world.

Shank (2006) differentiated between two schools of thought regarding the use of literature: 1) literature is valued and 2) ignorance is bliss. Exponents of the literature-is-valued school believe that a literature review should precede data collection, arguing that this empowers the researcher with valuable knowledge. Particularly, the literature review assists in identifying gaps in existing knowledge. The premise is that our understanding of a particular question is incomplete, and that by seeking the counsel of experts, one is more informed on the topic, as well as how to proceed with the study.

In contrast, proponents of the ignorance-is-bliss school believe that one must treat data on its own, setting aside one’s preconceptions and biases and allowing the data to ‘speak for itself.’ It is believed that reading up on the topic before collecting data only complicates the study, because it creates expectations regarding findings.

Shank (2006) suggested two stages in reviewing extant literature: First, read just enough to ensure you are not duplicating research. He proposed interrogation of literature as the second step, but noted that this should be delayed until the research is well under way, to allow the review to be based on field experiences and to obtain a fresh view whilst collecting data.

In this study, I followed both these stages. First, in order to compile my research proposal, I reviewed relevant literature on work identity. Second, after completing the first interviews and deriving themes from the participants’ accounts, I undertook intensive reviews of the literature, in an attempt to make sense of the participants’ everyday experiences (first-order concepts) (Schütz, 1962).

---

3 Other qualitative researchers who have various view of the role and place of the literature in qualitative research include Yin, (2011, pp. 61-62), Tracy, (2013, p. 184).
2.4.2 Linking theory and research

The link between theory and research is complex, with several issues, two of which are:

i) what form of theory one is referring to, and

ii) whether one intends to test theory or build theory (Bryman & Bell, 2007).

In qualitative research, the issue of theory is not simple. If one believes that theory in qualitative research should be built to make sense of peoples’ experiences and perceptions, one should distinguish between grand theories: those operating at a high level of abstraction, and those offering an explanation of people’s concrete experiences in particular settings or contexts — micro or middle-range theories, or, as in the case of grounded theory, substantive theory. Middle-range theories, according to Bryman and Bell (2007), typically guide researchers working in management and business.

Regarding linking research findings to theory, Eriksson and Kovalainen (2008) pointed out two methods used in social sciences, namely deduction and induction. “Inductive reasoning draws from observed cases, more general statements or general claims about most cases of the same kind. Deductive reasoning is concerned with the formation of hypotheses and theories from which a particular phenomenon can then be explained” (Eriksson & Kovalainen, 2008, p. 21). The authors argued that deduction and induction seldom exist as clear-cut alternatives. In fact, many researchers use both models in different phases of their study, and move iteratively between the two during the research process. Also known as abduction, qualitative researchers move “from the everyday descriptions and meanings given by people, to categories and concepts that create the basis of an understanding or an explanation to the phenomenon described” (Eriksson & Kovalainen, 2008, p. 23).

As will become clear in subsequent chapters, I used abduction in the present study.

Next, I outline my approach to research ethics.

2.4.3 Research ethics

Whilst scholars have written extensively about ethics and research ethics, the following statement made by Bloomberg and Volpe (2008, p. 76) is particularly relevant: “As researchers, we are morally bound to conduct our research in a manner that minimizes potential harm to those involved in the study.” According to Payne and Payne (2004,
p. 66), this entails: “respect and protection for the people actively consenting to be studied.”

Ethical dilemmas can arise at any time during research, and Marshall and Rossman (2006, p. 82) and Bloomberg and Volpe (2008, pp. 75-76) cautioned that one needs to remain alert to such challenges throughout a study. It is particularly important to ensure that you have preventive measures in place to protect the rights of the research participants. These include informed consent, protection from harm, and confidentiality.

In the present study, I consulted the literature relating to ethics (Bloomberg & Volpe, 2008; Eriksson & Kovalainen, 2008; Myers, 2013). I also obtained endorsement of the study from the Proposal Approval Committee of Department of Personal and Professional Leadership at the Business School of the University of Johannesburg. I also obtained approval from the organisation where the study was conducted, where most of the research participants were employed.

Prior to the interviews, I explained the aim of the study and the research process to all participants. I provided the contact numbers of Dr. De Braine (my research supervisor) in the event that any uncertainties arose regarding the study. Next, I verbally assured each participant that he or she would remain anonymous, and explained that I would assign codes to participants in the dissertation. I emphasised their voluntary participation and the right to withdraw from the study at any stage. Before the interview commenced, the participant and I signed a consent form, which had been compiled with Dr. De Braine’s assistance⁴.

In one instance, I had to reassure a participant of anonymity. Some participants were initially uncomfortable when I indicated that it was preferable to record the interviews, but allowed the recording to proceed. A few participants were initially hesitant to answer some of the questions; however, once they had been reassured that my interest was purely in their experiences of their work and that I did not judge them, they openly shared their views and experiences with me.

2.5 RESEARCH STRATEGY

A number of different research strategies are at the disposal of the qualitative researcher (Fouché & Schurink, 2011). Creswell (1994) identified five strategies

⁴ The consent form is included in Annexure 1.
namely: narrative research, phenomenology, grounded theory, ethnography, and case study. I opted for the case study as described by Eriksson and Kovalainen (2008) and Yin (2009) to answer the research questions. However, after having conducted my first interview, in a discussion with my supervisors, Dr. de Braine and Prof. Schurink, I decided to use grounded theory as research methodology.

From the qualitative inquiry literature, it is clear that grounded theory as conceived by its major architects — Charmaz (2006), Glaser and Strauss (1967), and Strauss and Corbin (1990) — is today a widely used framework for analysing qualitative data (Bryman & Bell, 2007). Grounded theory comprises a set of research procedures to develop theory without being committed to data or theoretical interests (Eriksson & Kovalainen, 2008). Bryman and Bell (2007) pointed out that grounded theory has two central features: “it is concerned with the development of theory out of data and the approach is iterative, or recursive, meaning that data collection and analysis proceed in tandem, repeatedly referring back to each other” (p. 585). In addition, Yin (2013) suggested that a bottom-up analysis is best to derive categories and theories when studying occurrences of social behaviour in real life. This, as Saunders et al. (2009) pointed out, provides the researcher with the opportunity to reach an understanding of the meanings people attach to what they experience. Many discussions of grounded theory are available in the literature, and rather than trying to offer a substantive exposition of the approach here, I follow Bryman and Bell (2011, pp. 585-588) in outlining its main features. These authors distinguished between tools and outcomes.

2.5.1 Tools

The enabling tools unique to grounded theory are:

- **Theoretical sampling**: “the process of data collection for generating theory whereby the analyst jointly collects, codes, and analyses his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges” (Glaser & Strauss, 1967, p. 45). Here, the process of data collection is guided by emerging theory.

- **Coding** is a central feature of grounded theory, and entails “breaking down data into component parts, which are given names” (Bryman & Bell, 2007, p. 585). There are varied stages of coding data. Of particular importance is Strauss and Corbin’s (1990) coding typology, which differentiates between open, axial, and selective coding.
• **Theoretical saturation** “refers to the situation in which no additional data may be found which the researcher may use to develop the properties of the category in question. In view of the fact that the researcher is seeing similar instances over and over again, the researcher becomes empirically confident that a category is saturated” (Glaser & Strauss, 1967, p. 61).

• **The constant comparison method**: Implicitly, rather than explicitly, used in contemporary grounded theory is an enabling tool in terms of which the researcher compares concepts carrying empirical indicators with each other, with a view to confirming or rephrasing the definition of the concept and its properties.

2.5.2 Outcomes

Using grounded theory results in a number of products, of which the following are arguably the most important:

• **Concept** refers to labels assigned to discrete phenomena, which serve as the building blocks of theory (Corbin & Strauss, 2008).

• **Category** is a higher order of construction than a concept, and may consist of two or more concepts that cluster around a core or central category (Merriam, 2009). Categorising entails selecting certain codes that have overriding significance. In other words, abstract common themes and patterns in several codes may form an analytic concept.

• **Property** refers to the unique attributes of a category, while hypotheses represent “…initial hunches about relationships between concepts” (Bryman & Bell, 2011, p. 587).

• **Theory** is “a set of well-developed categories … that are systematically related through statements of relationship to form a theoretical framework that explains some relevant social … phenomenon” (Corbin & Strauss, 1998, p. 22). In grounded theory, two levels of theory are distinguished, namely substantive theory and formal theory. Substantive theory refers to “the development of a substantive or empirical area of sociological inquiry, such as race relations, delinquency, or research organisations, while formal theory is at a higher level of abstraction and has a wider range of applicability to several substantive areas, such as socialization in a number of spheres, suggesting that higher-level processes are at work” (Bryman & Bell, 2011, pp. 587-588).
2.6 THE RESEARCH PROCESS

While qualitative research, as all social sciences research, entails a number of key decision-making steps, unlike its quantitative counterpart, it requires more than a set of “worked-out formulas” (Fouché & Schurink, 2011, p. 308). Particularly important is that it entails a flexible, cyclic process with no linear, well-planned consecutive phases (Eriksson & Kovalainen, 2008). Fouché and Schurink (2011, p. 327) pointed out that “no standard format can be set for designing qualitative research.”

My key decisions were: selecting a research setting and research participants, defining my role as researcher, collection of data, capturing and storing data, and ordering and analysing data. Let us now look at these individually.

2.6.1 The research settings and research participants

Unlike quantitative research, where systematic sampling methods are used, convenience sampling is typically utilised in qualitative studies. The researcher frequently makes use of his or her contacts (Denzin & Lincoln, 2012). With regard to qualitative business research, Eriksson and Kovalainen (2008, p. 51) stated, “it is common to use your previous contacts or some other convenience sampling procedures instead of more systematic sampling techniques, which are common to quantitative research. Whereas the purpose of qualitative studies is not to make statistical generalization, systematic sampling methods are not usually required. Accessibility and suitability of the research participants for the research at hand are more important issues.”

Some practical considerations influenced the approach and size of the present study. These included the availability of the participants across the various time zones and the number of PMs who were willing to participate in the study. Originally, I selected only cases within the organisation where I worked. Whilst conducting the research, I realised that I had to broaden my field to include experiences from another industry and from women’s point of view. The reason for this was that the mining industry is predominately male-orientated, and engineering dominated, which piqued my curiosity regarding the experiences of PMs outside the mining industry.

The criteria I used to select the research participants were: current or prior experience in leading IT and having been appointed by the outsourcer or client, either as a permanent employee or as a consultant. In addition, I selected a number of
participants who were part of the organisation's pool of PMs. Finally, using snowball sampling (Patton, 2002); I included candidates suggested by participants during the interviews whom I considered suitable.

I either spoke to the participants directly or via telephone to explain the study and enquire if they would be willing to participate. Whilst the majority of participants agreed, some were more eager to share their experiences than others.

The sample comprised ten participants with varied backgrounds. All the participants were working in an IT environment, and had experience in leading outsourced projects or programmes. Eight participants worked for a global organisation in the mining and resources sector, while the remaining two were from the financial sector. I included the latter to validate my findings.

The demographics of the participants included men and women of various nationalities and ages. During the interviews, they all shared insights and experiences regarding managing outsourced projects in their current and other organisations, industries, and geographical regions. The study was therefore enriched by the participants' past experiences in managing very complex outsourced project teams that were located in different geographical regions, with the added complications of different languages, customs, and work ethics.

The demographics of the research participants are displayed in Table 1. Their average age was 46.2 years. They were of three different nationalities and had worked in 11 countries. The countries in Table 1 do not include the nationalities of the outsourced vendor team members, as the vendor might have sub-contracted tasks to organisations or teams in various other regions. The demographics also indicate varied qualifications, work experience, and industry sector exposure.
### Table 1

**Demographics of Research Participants**

<table>
<thead>
<tr>
<th>Participant Identification</th>
<th>Age</th>
<th>Gender</th>
<th>Nationality</th>
<th>Work Experience in Countries</th>
<th>Qualifications</th>
<th>Work Experience</th>
<th>Industry Sectors Exposure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>54</td>
<td>Male</td>
<td>Australian</td>
<td>Australia; Singapore; South Africa; Mozambique</td>
<td>IT degree</td>
<td>Numerous global organisations</td>
<td>Mining and resources</td>
</tr>
<tr>
<td>2</td>
<td>53</td>
<td>Male</td>
<td>Belgium</td>
<td>Belgium; Singapore; Netherlands; Australia; South Africa</td>
<td>Engineering and technology information management, telecommunication techniques and various other courses</td>
<td>Management in IT</td>
<td>Mining and resources</td>
</tr>
<tr>
<td>3</td>
<td>45</td>
<td>Male</td>
<td>South African</td>
<td>South Africa</td>
<td>IT degree</td>
<td>Industrial engineering and IT management. Initial exposure in steel industry manufacturing and marketing. Started as business administrator</td>
<td>Mining and resources</td>
</tr>
<tr>
<td>Participant Identification</td>
<td>Age</td>
<td>Gender</td>
<td>Nationality</td>
<td>Work Experience in Countries</td>
<td>Qualifications</td>
<td>Work Experience</td>
<td>Industry Sectors Exposure</td>
</tr>
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</tr>
<tr>
<td>4</td>
<td>53</td>
<td>Male</td>
<td>Australian</td>
<td>Australia; UK; Germany; USA; Singapore; Japan</td>
<td>Financial management and postgraduate information systems</td>
<td>Seventeen different organisations, approximately 11 different industry sectors, about six business transformation-type programmes across the globe. Experience in risk, change and transformation projects, IT, trade floor, process mapping</td>
<td>Finance; Mining and resources; Education</td>
</tr>
<tr>
<td>5</td>
<td>43</td>
<td>Male</td>
<td>Australian</td>
<td>Australia; Singapore</td>
<td>Finance and accounting degree; Certified Practising Accountant (CPA)</td>
<td>Senior finance manager (12 yrs.); project manager (8 yrs.)</td>
<td>Finance; Mining and resources</td>
</tr>
<tr>
<td>6</td>
<td>37</td>
<td>Female</td>
<td>South African</td>
<td>South Africa</td>
<td>Postgraduate in project and programme management</td>
<td>IT experience; 18 years</td>
<td>Government; IT services; Mining and resource</td>
</tr>
<tr>
<td>7</td>
<td>46</td>
<td>Male</td>
<td>Australian</td>
<td>Australia; Africa</td>
<td>SAP certified</td>
<td>Finance; logistics, mining and resources (20 years' experience)</td>
<td>Mining and resources</td>
</tr>
<tr>
<td>8</td>
<td>41</td>
<td>Male</td>
<td>South African</td>
<td>South Africa</td>
<td>Management and commercial pilot</td>
<td>Manager</td>
<td>Retail and manufacturing; Mining and resources</td>
</tr>
<tr>
<td>Participant Identification</td>
<td>Age</td>
<td>Gender</td>
<td>Nationality</td>
<td>Work Experience in Countries</td>
<td>Qualifications</td>
<td>Work Experience</td>
<td>Industry Sectors Exposure</td>
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</tr>
<tr>
<td>9</td>
<td>52</td>
<td>Female</td>
<td>South African</td>
<td>South Africa</td>
<td>B.Com Ed and PMP</td>
<td>Business analyst; Project manager (8 years)</td>
<td>Education; Telecommunications; Financial</td>
</tr>
<tr>
<td>10</td>
<td>38</td>
<td>Female</td>
<td>South African</td>
<td>South Africa</td>
<td>Theology</td>
<td>Project administrator; Project manager/Programme manager</td>
<td>Telecommunications; Financial</td>
</tr>
</tbody>
</table>
2.6.2 Relationships with the research participants

“Successful execution of the design and data gathering is usually determined by the accessibility of the setting and the researcher’s ability to build up and maintain relationships with gatekeepers and participants” (Fouche & Schurink, 2011, p. 325).

It is difficult for a qualitative researcher not to include his or her personal experiences and interpretation when gathering and analysing data from interviews (Saunders et al., 2009). Using Yin’s (2011) and Tracy’s (2013) recommendations on insider research, I considered and declared my potential advocacy role. I used reflectivity which is “describing as best as possible the interactive effects between researcher and participants” (Yin, 2011, p.43) to cover this advocacy role. My own experience and development journey as a consultant in the outsourcing environment assisted me in using appropriate business terminology, and although I did not directly add my own experiences to the coding, I did, in some instances during the interviews, use my experience to facilitate the conversation. In doing so, I reflected on issues highlighted by the participants and how my experience might have influenced the responses I received. My own experiences led me to asking additional questions or probing for more in-depth information.

My understanding of the mining industry and the engineering mind-set of the participants aided my understanding of the lack of emotional responses I received. Most of the participants had never reflected on their work identity or the related values. In many instances, when asked about personal emotions or strategies to deal with situations, I received responses such as: “This is interesting. I never thought of this,” or just a blank stare and answers reverting back to the process or concrete deliverables. In some of these instances, I used either personal or observed experiences to probe their views. The interview was guided by an interview schedule. I reflected on the interviews using a journal, and formulated additional questions during the interview, to seek clarification where required.

2.6.3 Data collection

“Qualitative researchers are concerned about the validity of their communication. To reduce the likelihood of misinterpretation, we employ various procedures, including redundancy of data gathering and procedural challenges to explanation. These procedures, called triangulation, are considered a process of using multiple perceptions to clarify meaning. Keep in mind that the use of multiple methods of data
collection to achieve triangulation is important to obtain an in-depth understanding of the phenomenon under study" (Bloomberg & Volpe, 2008, pp. 72-73).

At this point, it is important to emphasise two points. First, the data collection was aligned to the principles of grounded theory, facilitating a circular approach. As the research shapes and reshapes, the data become clearer and richer (Charmaz, 2014). Secondly, I used a pilot study prior to the data collection, interviewing one participant to refine the questions to ensure that these were aligned to the research questions (Eriksson & Kovalainen, 2008; Mouton, 2001; Saunders et al., 2009; Yin, 2009). The pilot study also highlighted aspects of the interview setting and requirements to conduct and record interviews when using Skype or teleconferencing facilities. For instance, during the pilot study, I realised that my personal computer does not have the facility to record Skype calls. I resorted to using the participant’s WebEx facility to conduct and record the interview. However, these interviews were flawed, with numerous breaks in communication, due to poor Internet connectivity. Also, I learnt to interrupt the interviewee as little as possible, and to be careful when probing.

2.6.4 Interviews

Many types of interviews are used in social research. These include interviews using open-ended questions that are pre-formulated, unstructured interviews with a schedule where relevant themes are used to guide the interview, and, finally, in-depth interviews, where questions are developed spontaneously during the course of the interview.

My interview approach can best be described as moving from explorative to focused interviews. The initial interviews were followed up with another interview, in which I followed a more structured approach, whereby I sought to gain clarification on aspects raised during the first interviews (Yin, 2012).

I used an interview schedule to lead the conversation, whilst also allowing the conversation to flow, in an attempt to gain richer information. In follow-up interviews, I applied the same approach, whilst constantly enhancing my interview style. As the interviews unfolded, I included questions relating to explanations of certain aspects that were not clear to me, in order to gain a better understanding of the development of leadership identity in outsourcing arrangements. In short, the initial interviews were followed by more structured interviews, to gain clarification on aspects raised during the first interview (Yin, 2012).
The initial explorative interviews were intended to obtain information on the participants’ work history, their role within the inter-organisational project, and how they operated within the client- and vendor organisations. I allowed participants the freedom to provide background on their lives, beliefs, and values. These interviews also afforded the interviewees the opportunity to reflect on their skills, how they managed teams, how they experienced their work environments, and what they liked and disliked about their role and environment. Related to the study’s research questions, as suggested by Creswell (2003), Eriksson and Kovalainen (2008), and Saunders et al. (2009), I asked What? and How? questions about the participants’ experiences, opinions, feelings, and knowledge, as well as their interpretation of their role as leaders and the input they received from their environment (Saunders et al., 2009).

The first set of questions was intended to obtain demographics of the participants, whereas the next set related to how the participants’ work life evolved and how they started as PMs. Here, I enquired about how many outsource projects they had led and how many years they had been involved in leading outsource projects in various roles. As suggested in the literature, the questions were not fixed, and topics unfolded (Charmaz, 2014; Eriksson & Kovalainen, 2008; Terr Blanche et al., 1999). As the participants’ descriptions unfolded, I changed the question format and used clarification questions, or probed for more information.

Following Charmaz (2014), I enquired about the meaning the participants gave to their work environment and work identity and their intentions when dealing with teams. Also, I elicited more information when they emphasised certain words or phrases. For example, in order to gain insight into areas that might affect work identity, I asked about their typical daily tasks. These questions, in turn, led to others about team involvement, management of complex team structures, and management support. Finally, I asked the following to gain insight into their values, behaviour, motivation, and work preferences:

- what they liked most and least about their role;
- how they viewed themselves in their role, and how they managed stress and ambiguity;
- what their ideal work environment would be; and

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5 The questions used in the initial interviews are included in Annexure 2.
• what was important to them in life and/or what motivated them.

In many instances, these value-oriented questions led to further enquiry regarding the participants’ perception of trust and ethics. In this regard, I enquired about the following:

i) how they knew they could trust someone; and

ii) whether they believed that trust in a person or organisation could be rebuilt once broken.

The second round of interviews took place after I had coded the transcripts of the first interviews. Here, I followed a more focused approach. First, I used the participants’ views and ideas that had evolved to clarify and gain an in-depth understanding of meaning of the descriptions they had offered in the initial interviews. Second, as indicated above, I posed questions relating to relevant scholarly constructs, in order to make sense of what the interviewees had offered in the first interview. In the second interview, I generally focused on different areas of enquiry, and included comparative questions to test emerging theory (Charmaz, 2014).

The explorative first-round interviews lasted between 45 to 60 minutes, and the interviews in the second round lasted about 30 minutes. As five of the participants worked in remote locations, these interviews were conducted using Skype or teleconferencing. During these interviews, the participants were either at home or at the office. The remaining five participants were interviewed face to face, with two participants being interviewed at home and the other three in office meeting rooms.

2.6.5 Participant observation

While many definitions of participant observation are posited in literature, following it could perhaps be best described as a prolonged period of intense social interaction between the researcher and the participants, in the milieu of the latter, during which time the former, in the form of field notes, unobtrusively and systematically collects data (Bogdan & Taylor, 1975).

From the literature, it is clear that two types of participant observation are found in qualitative research, namely participant observation where the researcher is actively involved in the setting and/or the participants’ activities, and direct observation, where he or she does not participate in any activities, but takes a more passive role (Eriksson & Kovalainen, 2008; Yin, 2009). During the interviews, I assumed both a passive and
an active role. In many instances, I observed, but, in order to clarify answers, I often had to change to a more active role, providing some of my own insights or those provided by other participants to gain a clearer understanding.

2.6.6 Data capturing, storage, and analysis

Data analysis requires deciding on a process to manage and synthesise large volumes of data. Analysis entails identifying patterns relating to the objectives of the study. It entails reviewing raw data, categorising it in a construct or framework, and providing initial codes to quotes. This open-coding process includes ongoing refinement, and gives rise to the final coding schema (Bloomberg & Volpe, 2008).

In the present study, all interviews were recorded and, where appropriate, notes were made. The latter was not always possible, as I found that it influenced my rapport with the participants and interrupted my train of thought and ability to ask for more detail when something interesting was raised. After each interview, I made field notes using a guideline and contact sheet I obtained from a lecture (Gibs, 2012). These were captured in MS Word documents, together with the transcribed interviews. The field notes contained descriptions of the interview setting and observations about the participant’s mood at the start, as well as shifts in engagement during the interview. In addition, I included my own reflections on the interview, and made notes when the answers might relate to theory (Charmaz, 2014; Saldaña, 2009). Where possible, I noted non-verbal clues and environmental interferences. The notes were invaluable in coding, interpreting, and reflecting on the data (Eriksson & Kovalainen, 2008; Saunders et al., 2009).

- Transcription

I transcribed the first two interviews in full, but found the process very time-consuming. A professional scribe in MS Word documents was used to transcribe the remainder of the interviews. I then reviewed the transcripts for accuracy, replacing references to names with participant numbers and references to the company with pseudonyms. Participants are quoted verbatim. All the transcripts were kept safe in a password-protected folder.

- Memos and research journal

Whist coding the data, as is the practice with grounded theory, I kept memos in which I commented on definitions of codes and how each participant’s account either

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6 The research reflections guide used for the field notes and memos is included in Appendix 3.
collaborated or contradicted responses from the previous interview. The memos assisted in keeping track of my reflections, code choices, and thoughts arising whilst coding (Charmaz, 2014; Glaser, 1978; Saldaña, 2009).

As part of maintaining the audit trail to ensure quality research, I kept a journal with intermittent entries regarding reflections and internal dialogue during the research process.

2.7 DATA ANALYSIS

Due to the flexible nature of qualitative research, which has no strict guidelines and standards, each researcher will use a slightly different approach to analysis. Therefore, a detailed explanation of the data analysis, coding process, generation of themes, and display of data is required (Bloomberg & Volpe, 2008).

The grounded theory procedures I used to analyse and organise the data provided me with a systematic process. It is important to remember that the grounded theory researcher should create a new understanding or generate new theories regarding the phenomenon under investigation (Bickman & Rog, 2009; Glaser & Strauss, 1967). As stated by Strauss and Corbin (1990, p. 23), a well-constructed grounded theory study meets four criteria: fit, understanding, generality, and control. Therefore, the in-depth analysis should demonstrate themes and codes within the context, and explain how the process unfolded over time (Corbin & Strauss, 2008).

I engaged (i) with the detail and specifics of the data collected, and classified these into categories, in order to establish interrelations (Durrheim, 2006), and (ii) applied thematic analysis to determine patterns or themes, to reach an understanding of the experiences and perceptions of the participants and their situations that were specific to the research questions (Charmaz, 2014; Saunders et al., 2009). I cross-checked the participants’ accounts, in order to produce multi-dimensional views (Eriksson & Kovalainen, 2008) of their work identity within the inter-organisational structures in which they operated. Figure 2 provides a visual presentation of the data preparation and analysis followed using ATLAS.ti. I included primary documents in a hermeneutic unit, into which data were coded with associated memos and notes. In essence, the process was iterative, involving coding, writing memos, comparing data to prior knowledge, and reviewing additional literature (Eriksson & Kovalainen, 2008).
2.7.1 ATLAS.ti

Transcribing the interviews yielded extensive text. I used the ATLAS.ti software to perform the coding and to manage and explore the data. The software facilitates data storage, coding, and comparing, linking and creating network views to assist me with the recognition of themes, patterns, and relationships. Finally, it allowed me to capture memos and quotes while coding (Patton, 2002; Saldaña, 2009), and to create links between chunks of data, codes, and memos, which I could display in networks (Bickman & Rog, 2009).

2.7.2 Coding process

Coding is described as a pivotal link between the data and theory explaining one’s data (Charmaz, 2014). The procedures used by the researcher to analyse and organise the data is a major consideration in qualitative research. Having adopted a grounded theory approach, I followed a systematic process of data collection and analysis. The process involved the splitting of data, conceptualising it into themes, and integrating these into theory (Strauss & Corbin, 1998). Figure 3 depicts how my coding defined what the data were about, which I subsequently grouped into
categories of data segments with descriptive names. The process followed in creating abstract theory by using codes linked to categories to create themes (Saldaña, 2009).

Figure 3. Codes-to-Theory Model for Qualitative Inquiry (Saldaña, 2009, p. 12)

I assessed the data using the techniques of open-coding, axial coding, and selective coding, together with memo-writing. This process was not a linear progression, and the constant comparison led to alternating use of the different coding methods.

- Open coding

Open coding entails identifying data, concepts, and properties (Glaser & Strauss, 2008). It enables one to break down, conceptualise, and compare data. The coding was done by looking for fragments of data relating to the research questions, and naming and summarising the pieces of data. I also compiled notes and memos about the codes, such as my initial perception of how quotations either supported or varied from others. This process resulted in numerous codes, which soon became unmanageable. Once I had completed the coding of the second round of interviews, I created focused categories and sub-categories, using the literature and observations I had recorded in the memos and notes. The process resulted in merging underlying
codes as I integrated the large amounts of data (Charmaz, 2014; Strauss & Corbin 1990). Charmaz (2014) referred to this as focused coding, which is the grouping of initial codes and making decisions on how to categorise the codes.

The names I gave to codes and supercodes were not grammatically correct, but were used as a grouping guide. All the codes belonging to a supercode (theme) were prefixed with a supercode name. The codes had a grounding and density; for example, Leadership role: Manage outcomes had a grounding of 89 and a density of 4. The grounding and density changed as links were created and codes were merged.

In ATLAS.ti, underlying codes containing grounded values and supercodes had no grounding. I created a relationship between supercodes and underlying codes to generate a density value. The supercode Leadership role had no grounding and a density of 11.

- Axial coding

Axial coding is relates categories (supercodes) to sub-categories (codes), specifying properties and dimensions of the category (Strauss, 1987). It is a way of bringing codes back together and explaining relationships or causal conditions and providing density (Strauss, 1987), as it makes patterns visible. Once I had established the supercodes and codes, I created network diagrams and then linked supercodes and codes to one another. This process created themes, and the meaning of the data and theory emerged (Charmaz, 2014; Saldaña, 2009).

I first attempted axial coding at a very granular level, and, whilst insightful, this resulted in a spiderweb of linkages, which was difficult to explain. To create clarity, I used an iterative process of reviewing the memos and the selective coding. This also assisted me in deciding on the key codes to use in axial coding.

- Selective coding
Selective coding entails the integration and refinement of the codes or concepts around a central category, to create a story line (Strauss & Corbin, 1990). I performed selective coding by organising codes into themes\(^7\). I felt I had reached saturation when I found that participants had started to mention experiences similar to those I had identified in relation to the main categories, which resulted in my being unable to distil more themes.

2.7.3 Memo writing

Memos assist the researcher with sorting and questioning the data whilst comparing what is observed and understood from the interviews and data, to generate categories (Charmaz, 2014). Throughout the coding process, I wrote and updated memos. These memos detailed my initial thoughts, definitions I gave to codes, and how I compared these to other details in the data. These memos were later used to merge relating codes and for further reflection. Finally, I used the codes with associated quotes and memos to describe my findings.

2.8 CONCLUSION

The research approach and the methodology of the study, as well as the key decisions I took during the research process, were described in this chapter. The next chapter presents the research findings.

\(^7\) This is represented as ATLAS.ti networks, and findings using codes and quotations. Please see Chapter 3.
CHAPTER 3: RESEARCH FINDINGS

3.1 INTRODUCTION

This chapter focuses on the study’s findings, which are categorised according to themes. During the analysis phase, I assigned codes relating to the research questions to excerpts of the participants’ accounts. These codes were later grouped into themes. Using axial coding, I then identified relationships between certain codes and themes, presented as network diagrams. I attempted to keep the network presentation readable, and, therefore, relationships between codes and neighbouring codes or themes are not always included in the figures. In addition to presenting code relationships, network diagrams also indicate codes’ grounding (G) and density (D). Grounding is the number of times a quote or excerpt was assigned to a code, while the density is the number of relationships the theme has with codes. The findings are described per theme, for example, Leadership Role, with underlying codes, e.g., Manage outcomes. Due to the large amount of data, I only included key quotes to substantiate descriptions of the codes. Finally, the excerpts of the accounts of the participants taken from the transcripts of the interview are presented verbatim.

3.2 FINDINGS

The findings are presented according to seven themes, with the first three: (i) Leadership Role, (ii) Work Motivation and (iii) Personal Attributes, relating to the work requirements that the participants needed to fulfil within an outsource context. The next four themes: (iv) Industry Knowledge, (v) Business Skills, (vi) Global Mind-set, and (vii) Interpersonal Skills, describe competencies these PMs had attained in order to perform their roles and build their work identity.

Due to the nature and complexity of leading inter-organisational teams, some codes were assigned to more than one theme, and some sub-codes were assigned to more than one code. The findings could be likened to a spiderweb, with codes overlapping in themes, and codes and themes building on one another. This led to some overlap in the findings, and I specifically included these to indicate the complexity and interconnectedness of leaders’ work identity. I now turn to the theme Leadership role in the context of outsourced projects.
3.3 LEADERSHIP ROLE

The roles leaders accept affect the development and maintenance of their work identity (De Braine, 2012). In the present study, these roles required of the participants to function as PMs in an outsource environment. Figure 4, the Leadership Role Network, reflects the following codes that emerged related to this theme: Manage outcomes, Transition work, Planning, Problem-solving, Administrative work, Governance work, People management, Team-building, Trust, Role uptake, and Management support.

The first code under discussion in the theme is Manage outcomes.

![Leadership Role Network](image_url)

**Figure 4.** Code network of the theme Leadership Role

3.3.1 Manage outcomes

Manage outcomes was cited the most, and is associated with all the other Leadership Roles codes (see Figure 4). In this section the associated Leadership Role codes are
discussed according to their relationship to manage outcomes and will also be discussed under separate headings. For clarity these codes will be highlighted in bold.

Manage outcomes described the PMs’ accountability in managing the outcomes of outsource deliverables, for example, implementing a technical solution and handing it over to the instructing organisation. To manage these outcomes, the participants mentioned the importance of interpersonal relationships and the ability to change their communication style, with clear and open discussions as key, as discussed later.

Although all the leadership roles in Figure 4 are associated with Manage outcomes, it was cited that the management of the contract, which is related to the codes Administrative work and Planning, had the greatest effect on managing outcomes. A lack of clearly defined outcomes in contracts affected the quality of delivery and timelines. A solution offered by one participants was to divide these deliverables or outcomes into small, fixed work packages and describing these in the contract.

All participants described high levels of self-awareness of how these affected and influenced the work context and their ability to manage the outcomes. One participant stated:

“So, once again, I just focus on the role at hand and try to deliver on the goals of the project.”

The ability to identify and manage project- or programme risks is part of managing outcomes. An unexpected finding was the strategies used by various participants to measure and manage risk. A number of the participants managed risk by first prioritising reputational risk and then considering risks to cost and timelines. The conclusion I drew was that these participants took great pride in what they did and how well they thought they performed, and therefore closely managed their reputations. To test this conclusion, I asked how they knew they performed well, and all the participants described an internal sense of achievement. One participant stated:

“It just feel right, and I take pride in what I do. I can influence to a certain level.”

To manage risks, the participants pointed to the ability to think strategically whilst solving problems, and focusing on project outcomes and not people when challenged in achieving project outcomes. In this regard, one leader noted:
“You just need to think of which approach to get to the ultimate outcome, because, at the end of the day, it doesn't matter how I cut it. If I am a project manager, I never want the project to fail. So, it's focussing on the project and not the people if it gets challenging.”

Planning\(^8\) was another aspect often cited as affecting outcomes management. In the present study, planning included the ability to manage complexity within the context of various organisational processes, which tests the leader’s ability to change communication style and choice of medium to deliver the communication. For instance, due to distributed team locations, leaders are often required to communicate using audio technologies such as conference- or Skype calls, with very little face-to-face communication. Added to this communication complexity is the variety of accents, regional terminology, and technology interruptions, which affect planning and understanding of outcomes.

Also mentioned as influencing outcomes and taken into consideration during planning was organisational processes. For instance, a client’s preference for document delivery in a certain format may not be aligned to the vendor’s format. The alteration of documents not only slows down progress, but also affects team morale. All the participants indicated a preference for a pragmatic approach, which adds value to reach an outcome, instead of changing format of documents. Three participants believed that outsourcing might not be the answer to achieving organisational outcomes, citing the lack of vendors with industry experience and loss of intellectual property. In addition, participants reported differences in country cultures in an inter-organisation team structure as affecting outcomes. As an example, they indicated that certain cultures focus more on self-promotion and talking, rather than actions. This affected delivery, how the PMs worked with diverse teams, and the PMs’ work identity.

Management support\(^9\) was mentioned as directly affecting participants’ ability to lead. To deliver on outcomes, the participants described that they needed the willingness of vendors to get the job done and provide the client with what they wanted, but pointed out that management indecision often prevented delivery. To counter this, the participants indicated a preference for upfront communication from management, with a clear understanding of objectives, and thereafter leaving it to vendors to schedule

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\(^8\) Please see Section 3.3.3  
\(^9\) Please see Section 3.3.10
activities. The description below provides an indication of the participants’ work preference, which was a combination of people- and process-orientation:

“I’m a people’s person, but also a process–product person. So, for me, it is all about the outcome. So, be it upfront, I have a clear understanding what the objectives are of whatever activity, be it from the schedule that I drive, and, for me, it is very easy to get the guys together and tell them… You know, I give it, and I leave it up to their prerogative to call out the schedule of change on the activity. They know what my objectives are and what my outcome is, and, if they deliver accordingly, all is fine. I track those interdependencies myself, be it from a programme perspective. Yes, and if there are deviations, obviously, you make provision in continuance for that too. But, sometime, you just don’t. And then you need to adjust accordingly.”

To realise outcomes, the participants employed various strategies, indicating the need for flexibility in their working environment, with a focus on getting the job done and less emphasis on the team’s time of arrival at and departure from work. This flexibility also extended to compromising on solutions to reach outcomes, as shown in the description below:

“We set the expectation right from Day One. So, you tell them, ‘You need this, this, this, and this is how it needs to be done. Can you do it like this?’ If they say no, they can do it like that, then you get a compromise somewhere, where both companies benefit and go forward.”

Related to reaching project outcomes, the participants described dealing with having missed a deadline (slippage). Participants with a preference for more detail-orientated work, tracked projects by looking at ways to address slippage before it occurred, and did not wait until a deadline had been missed. One such participant reported never having had a project fail.

The next code discussed is Transition work, which is related to two other codes: Manage outcomes and Problem-solving.

3.3.2 Transition work

Transition work required of the PMs to translate business requirements, and, sometimes, design solutions, into actions assigned to various teams and stakeholders. Not surprisingly, the code is also related to the theme Interpersonal skills, as it often entails translation of requirements between vendors, as well as within the client
organisation, between the IT- and business departments. Transition work not only required interpersonal skills, but also strategic thinking and an understanding of change management. One participant described the transition work role as follows:

“My roles is programme transformation and include meetings, giving guidance, making decisions, working with external vendors. I also take time with my direct report for on-on-one conversations once a week, and are involved in people development.”

One participant mentioned that, in order to fulfil this role, the PM needed some understanding of the various areas within the business, for example, relevant legislation, with the ability to translate the impact thereof on IT projects. One participant commented:

“Remember, their role in this example is commercial-owned. Yes, then you have a legal side of it, so you need to, sometimes, understand a legal lingo, as well as to why this and not that. But, also, you are the technical owner of the services, and you need to be then definition-inclined as well.”

A transition role requires personal resources and various foundational competencies, such as business skills, industry knowledge, and interpersonal skills. Let’s now consider planning. I already touched on this in the discussion of the code Manage outcomes.

3.3.3 Planning

Planning is a fundamental requirement of project management, aimed at ensuring execution and smooth transitioning of activities between various teams. Associated codes are: Problem-solving, People management, and Transition work. Planning includes initial planning of projects, as well re-planning, in order to resolve issues and risks, and to include scope changes. Also, it includes the planning of resources and quality of delivery in terms of success criteria and budget. In order to plan effectively, participants indicated the need for inclusivity and alignment of all team members, and described a roadmap as an essential component of planning.

To fulfil this role, the PM has to facilitate meetings or workshops, ensure correct information-gathering, make sense of information, and organise teams. The participants described their ability to gather information as key to planning, necessitating skills such as asking open-ended questions, active listening, and providing feedback on what they understood. The initial planning phase is followed by regular checkpoints to measure progress, and to realign and discuss mitigation when
delivery was not according to plan. As described in the excerpt below, these actions require the ability to think issues through and test outcomes in order to redirect the team:

“Before you assign that task, where are you going to catch it out or test whether it is going in the direction you want? That is what always keeps your mind running, to think of the different permutations and combinations of stuff. It is never the same thing twice.”

Due to external influences, re-planning is often required in projects. For instance, in the mining industry, re-planning could be due to an unforeseen event such as a fatality at a site or an IT production error requiring project resources to redirect their energies. Incidents such as these, described below, require of the PMs to keep sight of the ‘bigger picture’ whilst managing stakeholder interaction:

“Especially with the dynamic world where, one day, you can have a fatality. It screws your schedule by four weeks even, because the operational site goes into lockdown mode because of a fatality and you need to lock down. Then you move on something else.”

The participants described various personal strategies and how their own personal development through their career had changed the way they executed planning. Strategies included remaining flexible and redirecting the team to other tasks while re-planning took place. Personal development in taking up the planning role was described as follows. In the beginning of their career, they wanted to have everything planned, but, with experience, they realised that one cannot plan everything accurately in advance, and they started following an agile approach of planning for what is known and re-planning as the project continued. In contrast, one participant indicated that, if you do not plan, you are not doing your job, and disagreed with the agile approach. He stated:

“As a person, I think there is a lot you can plan upfront. And, as a person, I feel, now, … with all that … again, that agile excuses people have … that most of the people bringing on changes because they did not do their job.”

All participants indicated that work experience and good people management skills enhanced upfront planning. These skills not only aided their planning, but allowed PMs to delegate, follow up, and manage issues as they arise.

The aspect indicated as most often affecting planning was problem-solving, which is discussed next.
3.3.4 Problem-solving

Problem-solving includes facilitation to find solutions as issues arise, as well as influencing and reaching agreements with stakeholders. As one participant described:

“And that you had to go back to the drawing board and call it into your Steerco that this is the constraint, this is the implication, these are the options.”

This code is closely associated with the codes Planning, Transition work, Manage outcomes, and People management. Nine participants indicated that problem-solving was not only their responsibility, since it entailed a team effort, requiring inputs from both vendor and client. As shown in the quote below, it further required of PMs to remain open to suggestions and foster close relationships:

“First try to keep the relationship and to see how you can assist them and to maybe help them to deliver faster, and it is a team effort at the end of the day.”

In contrast to the collaborative approach, one participant wanted the vendor to provide detailed proof before opening up to solutions proposed by the vendor.

All the participants indicated that some organisational processes limited their ability to influence decisions. For example, incorrect reporting by vendors was a major source of frustration, and taking time to manage this hindered problem-solving.

Participants described how problem-solving is influenced by the organisational context; however, quite surprisingly, most participants said they would not leave their position when faced with problems, and would keep on trying to find a solution. One participant stated:

“I just try and make it work. That’s my position, that’s my role, [even if I don’t agree] I try and make it work.”

All participants enjoyed the challenge of solving problems, but they also pointed out that, if not managed properly, it could affect the other roles they needed to perform. It seemed that their self-perception of being good problem-solvers was key in how they viewed their work identity.

The next two codes, are described together Administrative work and Governance work. The reason for describing these codes together is that participants grouped
these roles together in discussions. While they deemed these roles necessary, it did not elicit the same passion from the participants as the ones previously discussed.

3.3.5 Administration work and governance work

Administrative work, as mentioned earlier, includes costing and contract management. Governance work entails adhering to principles of good corporate governance and auditable outcomes. While the participants viewed administrative and governance roles as having the ability to add value, they indicated that most of the required project documentation was worthless, implying merely the ticking of boxes, which added to their workload. The following describes this well:

“No, sometimes I think it is an overkill. Sometimes, I think a lot of the documentation is a tick in a box, rather than adding any value. In certain cases, it is definitely valuable. Like, for instance, a business case I always find very valuable. In some organisations, it is not a required document. You can actually be very far down the line in a project where there is no business case.”

Contract- and budget management are aspects of administrative work that require the measurement of progress of work against the agreed project budget. As stated below, it also includes management of any cost implication imposed by project changes:

“If you are not really careful about how you draw up the contracts, every little extra thing is going to cost you more and more and more.”

Most participants used line outcomes specified in the contract to track delivery and cost implications. Some applied scientific measurement tools that resonated with their engineering and accountancy backgrounds.

Governance work requires the issuing of progress reports to ensure auditability and to manage expectations. The participants all recognised the value thereof, with one specifying adherence to strict governance processes and comprehensive documentation. However, some indicated that reporting that required four different formats was laborious and frustrating. Finally, one raised the issue of vendors’ inaccurate reporting as affecting his trust, as it was not aligned to his values of honesty and transparency.

As is clear from the above, Governance work and Administrative work influence the next code, People management.
3.3.6 People management

The code *People management* includes leading and influencing teams. This code had the highest density, indicating a high association with all other codes in the theme *Leadership Role*. All the participants stated that people management took most of their energy. As described in the quote below, the PMs worked as part of teams:

“Fortunately, I don’t do it alone. I cannot take the claim for all of it. I do have a dedicated team.”

The participants pointed out that team alignment is important, and that, rather than using comprehensive presentations, they preferred discussing progress or issues in coffee-drinking sessions. They further managed teams by holding people accountable and responsible for delivery and managing resources.

With vendors with diverse backgrounds involved, people management required leading technology teams and ensuring stakeholder engagement, which were both associated with *Team-building*. While the participants noted that the advantage of outsourcing is having a wider pool of resources to choose from, it required more people management. Also, they could not always pick the teams. At times, vendors supplied team members who were incompetent or did not match the team profile. The participants reported replacing team members in such instances. One of the participants put this as follows:

“One of the advantages of outsourcing is having a wider pool of resources to draw on. If the person that is assigned to your project, and if there is a personality clash or it is not the correct person, you can easily say, ‘Remove them.’”

Replacement of team members was reported more often in geographical regions outside of South Africa. These replacements proved particularly frustrating in the South African environment with its strict labour policies and requirements of employing race rather than competence.

Both the country’s and the organisation’s cultures impacted team dynamics, resulting in PMs having to adapt their management style. This, in turn, shaped the PMs’ work identity, which is discussed under the theme *Global mind-set*[^10], in the following section. This awareness of different cultural impacts was described as follows:

[^10]: Please see Section 3.8
“They also had an Eastern person in there that knew the process and protocol. It was not necessary to know Mandarin or Cantonese. You just had to be aware of how the five-family system worked in Singapore. It was kind of an enforced democracy, if you know what I mean.”

Also, with regard to People management, participants reported that language barriers influenced the management of teams. In these instances, they used the technology available on Google to translate their message. They added that, although video conferencing was available, interaction where people meet face to face was preferable, as described below:

“…to influence in South Africa and Australia, working closer together. They are still geographical [different]; we’ve got that as a problem, but the fact that people are flying in-between the two countries, particular in the IT side, I think is a huge benefit in getting people into interacting together.”

Some participants also touched briefly on generational differences, mentioning that Generation X (1965 - 1980) and Millennial (1981 – 1996) team members necessitated a change in management style.

“…you can do stereotype on what drives Baby Boomers, Generation X and Millennials and see how they operate… [you then] have to look at how you adapt the management style.”

Participants, in general indicated that planning influenced team dynamics and the building of teams. The participants mentioned an increase in team viability and production when planning was adequate and people did not suffer work overload. Although face-to-face meetings and technology such as Skype and audio conferencing to manage people were mentioned, the participants agreed that e-mails were not an effective means of communication to influence people. They found the great number of e-mails a hindrance to productivity.

“People [team members] are not productive anymore because they are overwhelmed by emails… so I don’t like emails. I prefer communication in short meetings where we talk to people.”

Finally, all agreed that the key to people management is respect:

“I think it boils back to respect for everybody. If you treat a person with a certain amount of respect, they will follow it.”

As part of People management, the next code discussed is Team-building.
3.3.7 Team-building

Team-building as described by the participants requires the ability to build and maintain relationships whilst working together towards a common goal. It requires strong interpersonal skills. Some participants reported working so well with vendors that the vendors requested to work with the PMs again. In this regard, one participant commented:

“Actually, one of my key vendors recommended me for a job back at [Company B], which was a technology architect for the outsourcing agreements. So, they went, ‘Yep, we want to work with you over here.’ I’m thinking I’m good at building relationships I’m working with.”

Participants cited the key to team-building being the PM’s ability to remain open to inter-team discussions and diversity, whilst remaining focused on outcomes. One participant stated:

“My ability to work with people, to be comfortable with people, and, vice versa, make them comfortable with me.”

All participants agreed that building successful teams and good team morale required management support\(^\text{11}\), sponsorship, and treating people as one team. For example, when management develops people or educates vendors about the client environment and company culture, improved results are realised in terms of client–vendor relationships and outcomes. This was described as follows by one participant:

“Communication is very important. Team-building is very important. Appreciation is very important. The fact that you have to realise that one plus one should be three instead of two. Team-building is so, so important. It does not matter whether it is a vendor, because there is no difference. You work in a team. And, please, don’t treat them differently.”

One participant also stated that understanding the vendor’s processes assisted team-building:

“I couldn’t have done that [delivered outcomes] with them not having worked with them and learnt how they operate in the background. So, working in that culture and trying to understand the context of this person.”

All participants cited people management, coupled with one-on-one communication and coaching, as the most time-consuming role, but recognised its value. In addition,

\(^{11}\) Please see Section 3.3.10
all agreed that a lack of vision impacted team motivation and their own and the team members’ work identity. Two participants used a motivational strategy of focusing on benefit realisation and introducing fun in projects. Interestingly, there were varied responses regarding forming friendship with team members, with half of the participants indicating a preference for a professional approach. The forming of friendships is also discussed under the code *Interpersonal relationships*\(^{12}\).

When managing different skill sets, participants reported not hesitating to remove someone who did not meet the skills requirements. One labelled team members who were not open for discussion ‘*blockers,’* and reported frustration when dealing with such team members. They viewed their ability to influence as part of their identity, and took great pride in this ability.

A code closely associated with *People management* and *Team-building* is *Trust*.

3.3.8 Trust

*Trust* refers to attributes associated with personal traits and behaviour that affect management style. I asked the participants how they knew someone was trustworthy. Most participants described it as being evident in a person’s intentions, and the knowledge that he or she will perform to the best of their ability. Some indicated that they did not trust easily, and expected the unexpected. In these instances, they mentioned asking questions to understand underlying hierarchies in organisations and processes. In these instances, the participants described that trust is strengthened when a vendor delivers what he promised and if the reporting provided was accurate. Some described making use of a ‘gut feeling’ followed by more concrete evidence, such as failure to deliver. One participant stated:

“I guess, it is initially a gut feeling, until they do the wrong thing.”

As expected, the leaders responded differently when asked about regaining trust that had been broken. Some PMs were not willing to trust team members again, and, in some instances, they even had people removed from teams. However, most of the PMs indicated a willingness to continue engagement with the team members, but indicated a strained relationship and viewing vendors’ or team members’ actions with suspicion. Regarding trust, one mentioned the following:

\(^{12}\) Please see Section 3.9.1
“It [failure to deliver] would put the trust at risk. The relationship would be stressed.”

With outsourcing and team members working in different geographical regions, PMs had to rely on delivery. Half of the participants felt that they had lost control, and trusted begrudgingly. Three provided examples of personal attacks or ‘backstabbing’ that they attributed to people wanting to protect their reputation or who show a lack of benevolence. They indicated that, in this instance, the trust would never be restored. This is shown in the excerpt below:

“A lot of people are there just doing stuff for their own gain and their own reputation, and to get the little chip on the shoulder to say, ‘You’ve done great,’ but, meantime, you did not do the work that you say you have been doing.”

Trust formed an integral part of PMs’ interaction with vendors, and it affected the outcome of projects. The participants were unanimous that the building of trust took time, and that it changed during the various phases of a project life cycle. They measured trust differently, with some believing everyone has some level of benevolence, and others indicating that it is gut feeling, followed by concrete evidence. They ascribed a break in trust to either incompetence, a lack of benevolence, or personal attacks due to team members’ agendas; some indicated that they, at times, had been completely “blindsided.”

The participants had varied responses to being betrayed. Some indicated that they had become reserved, whilst others said they would have people who betrayed them removed from the project. Three participants stated that they would never trust the vendor or person again.

In order to fulfil the various roles, the PM has to be prepared to take up the role. Therefore, we next discuss Role uptake.

### 3.3.9 Role uptake

*Role uptake* relates to how the PMs take on the various roles whilst maintaining their work identity. All the participants took their respective roles very seriously, with one participant describing the project as analogous to raising a child. This participant likened the vendors and other team members to the responsible adults raising the child. He described role uptake as follows:
“You get a role; you get responsibilities and treat those things as your own kids. You want to see them grow up, you want to see them having manners. After a while, you have to let them go as adults. That’s how you also have to treat every role, every responsibility you accept at work, isn’t it?”

Interestingly, as shown in the statement below, all the participants reported quick uptake of their various roles, in order to put a stamp of control on it and set expectations, but they disengaged just as quickly once the project had been completed:

“I normally quickly jump on it. I like getting involved in it quickly, and to start planning it, and not wait.”

Due to the ever-changing nature of job requirements and project ambiguity, PMs constantly had to re-engage in role negotiations. They reported initial role uptake, followed with considerations regarding when and how to engage with the various roles, as a product of business experience. Not surprisingly, participants with more business experience and flexibility reported greater efficiency in negotiating roles. One reflected as follows:

“It’s quite easy if I can focus on the new role and not do twenty different other things.”

In contrast, one participant mentioned having no tolerance of grey areas, and indicated being unwilling to take up a role if its scope was not clear. In further discussions, this participant agreed that this aspect was associated with his personality and previous life experiences, which had required a very detail-orientated approach:

“…needed to know exactly what was expected of me. I asked them, ‘Tell me exactly what you want, and I will make it happen.’ So, again, I don’t like grey. Grey doesn’t really work for me, so it is either true or false.”

When probed to describe how they took up their roles, the participants reported a very unemotional and practical approach. Some participants described frustration when they were required to complete an existing project while having to start a new project. In these instances, organisational structures, too few people, and unnecessary organisational processes where mostly to blame. To take up new roles whilst

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13 Please see Section 3.7.1
concluding a project necessitated these PMs to work overtime, which affected their work–life balance. This is discussed in more detail under the theme Work Motivation. Role uptake was further affected by the type of project, and PMs had to employ adaptive management styles. As the excerpt below reveals, some projects required more engagement in detail than others:

“But back to that detailed thing. You have to adjust to the role that you’re playing. If you’re doing … a technical project, you are more in detail than a programme that’s been broader. ‘Cos you can’t be in-depth and you can’t be inwards.”

The participants employed as consultants reported that permanent employees viewed them as part of out-groups, which created challenges in getting the job done and obtaining information. In addition, when decision-makers had different agendas, participants’ role uptake was hampered. This brings into focus management support.

3.3.10 Management support

The code Management support entails managerial direction, decision-making, contract re-negotiation, and recognition of achievement. Several participants thought that outsource projects often failed due to the lack of continuous managerial support within the client organisation. In fact, two reported experiences of management with opposing visions and the effect that a lack of strong sponsorship had on them in terms of outcomes management, team development, and coaching. One participant commented:

“… it is Mission Impossible, because none of the general managers wanted the project to be successful, and it was comprised because they all wanted to go their own way; they all wanted to try their own thing.”

Some participants described instances of cultural practices impacting management’s ability to support outsource projects. For example, as shown in the excerpt below, one recounted an instance in an Eastern culture, where decisions are not necessarily made within the organisation, but by parties outside the organisation:

“…Singapore is managed by five families, which effectively makes up the parliamentary system … and there is no opposition.”

Most participants formed close relationships with management to build trust and gain support. In general, the participants found this lack of support and direction very frustrating, as well as one of the main reasons for becoming despondent, which affected their view of their own delivery. Their self-esteem was especially affected
when team morale was impacted and their teams start asking them, “What are we doing here?”

Some participants followed a pragmatic approach and started to work on other aspects of projects while they waited for decisions. Two participants indicated that they left organisations when they did not get the necessary management support, as they felt failure to deliver would affect their reputation negatively. The lack of management support clearly affected how the participants viewed their ability to deliver, provide direction to teams, and follow processes, as well as their self-worth.

Having considered findings relating to leadership and managerial roles, strategies leaders employed to fulfil these roles, the trust relationship, role uptake, and management support, we can now turn the next theme: Work Motivation.

3.4 WORK MOTIVATION

Work Motivation relates to questions about what energises leaders, what makes them stay engaged, and what directs their behaviour (Steers & Porter, 1991). Related to several themes, the participants indicated the importance of the ability to communicate expectations to vendors and teams alike. This was also prevalent with regard to Work Motivation.

To understand how participants stayed motivated at work and how this might shape or influence their work identity, I enquired about their most and least successful project. I also asked them to describe their ideal work environment. Furthermore, their answers to what would make them leave an organisation led to important insights. As shown in Figure 5: Work Motivation Network, below, three codes emerged with regard to this theme, namely: Clear personal outcomes, Work–life balance, and Interesting and challenging work. Figure 5 also portrays the relationships between these codes, as well as their grounding and density.
3.4.1 Clear personal outcomes

Clear personal outcomes was the first aspect that struck me whilst reading and coding the interviews. These were related to work, as well as expected outcomes related to interpersonal interactions and team delivery. At an individual level, the participants mentioned wanting to make a difference in the organisation and going home with a sense of achievement. All described an awareness of how their various work environments affected them, and were quick to identify an organisational mismatch. When queried, each had a very clear description of how this mismatch influenced their behaviour, with the most common quote being: “I hate getting out of bed in the morning.” One participant described congruence as requiring a cognitive match between the organisation, the project, and his own internal conversation: ‘Why are you in the job? Does the job match what you want? Are you getting what you want out of it?’

A number of participants indicated how, in the past, they had changed organisations, because they did not want to get to the end of their careers and regret not having done the things they had set out to do.

At an organisational level, the participants also outlined that clear personal outcomes enabled them to stay motivated when leading teams. They mentioned requiring a mandate with adequate control to communicate expectations with the teams. They had a certain notion of how they wanted to lead teams, and believed that an inability or interference would lead to demotivation. As an example, one participant said that
organisational expectations compromising his personal values in leading would result in his departure from the organisation:

“I never compromise my values. So, if an organisation wants to compromise my values … that’s when I walk away. I have never compromised my values, never. And I would never do so for a project or an organisation, no way.”

Having described the PMs’ job-fit expectations and requirements, we next turn to work–life balance.

3.4.2 Work–Life balance

*Work–Life Balance* refers to the impact of the nature of the PMs jobs on their family life. All the participants pointed out that the long working hours required, including over weekends, negatively influence their family life. This was the aspect of their jobs they most wanted to change. One stated:

“I don’t like it, and I am neglecting my family, but you have to do it to stay in charge of what you are doing, on top of everything.”

It was therefore interesting that the code *Work–life balance* was mentioned very seldom. A number of participants related how long hours and experiences at work affected their family life. One put it as follows:

“Your kids can pinpoint. You do not even need to speak. The way you climb out of the car, your facial expression, your kids interpret.”

Every interviewee expressed concerns in maintaining a work–life balance, and whilst they accepted that, at times, long working hours were unavoidable, they indicated efforts to manage this imbalance and only tolerating it for a certain period.

“So, there’s a tipping point of where you enjoy that and where it becomes personally challenging, whether it’s fatigue, whether it is personal life, etc.”

As coping strategies, everyone mentioned a hobby or other escape mechanism to recharge. These included creative activities, exercise, travelling, and felling trees. In addition, they explained that family life remained an important consideration in making decisions, for instance, where to work and which projects to take on. One participant noted:

“[As long as] my family is healthy and happy. Very, very important. I always said I can change my job a thousand times, I am not willing to change my family. Not, okay.”
Next to *Work–life balance*, the code surfacing most when discussing motivation was *Interesting and challenging work*, which is discussed next.

### 3.4.3 Interesting and challenging work

The code *Interesting and challenging work* emerged from descriptions of challenges experienced in past projects and how teams solved these. During these discussions, the participants became very animated and lively. Their definitions of interesting and challenging work included innovation, interaction with different people, implementing technical designs, and thriving on the constant change taking place. One participant put this as follows:

“.. it [projects] *is never the same every day. Just as you think you have a solution. It is dynamic.*”

As discussed under *Work–life balance*\(^\text{14}\), the participants acknowledged the impact of challenging work, but described it as more important, indicating that they would rather manage their work–life balance than forgo the opportunity to engage in challenging work. The participants described different strategies in dealing with challenging situations. Some used organisational processes, such as requirements of vendors in completing documents, and stalling and allowing themselves an opportunity to evaluate various options to solve challenges. Others were more collaborative, and leveraged vendors’ and internal parties’ involvement to solve challenges.

Most participants linked interesting and challenging work to motivation due to their personalities, and indicated they would quickly lose interest if the work were monotonous. One put it as follows:

“*[I like to] organise something and building stuff. As soon as it is built, then I lose interest.*”

When asked how they would know the creative process of a project is complete and work is no longer challenging, the participants said that, as long as they felt they made a difference, they would stay, but, as soon as they felt ‘missable,’ they would leave the project. One participant stated:

“…*when I am missable, when I can be missed, then I think my job is done.*”

\(^{14}\) Please see Section 3.4.2
The participants considered successful projects highly energising and a driver to embark on the next one.

This brings us to the next theme: **Personal Attributes**.

### 3.5 PERSONAL ATTRIBUTES

As displayed in Figure 6: **Personal Attributes** Network, below, the theme includes the codes *Traits and behaviour, Career picked me, Personal values,* and *Management style*. The **Personal Attributes** theme is closely associated with codes in all the other themes (*Leadership Role, Work Motivation, Industry Knowledge, Business Skills, Global Mind-set,* and *Interpersonal Skills*), resulting in overlaps in the findings. As mentioned, to keep the network diagrams simple, associations between themes are not shown in the figures.

![Code network of the theme Personal Attributes](image_url)

**Figure 6.** Code network of the theme *Personal Attributes*

#### 3.5.1 Traits and Behaviour

The code *Traits and behaviour* is linked to aspects of personality, influenced by personal values and beliefs regarding behaviour. The participants indicated a variety of personal attributes and behaviours; I discuss those most frequently mentioned below. The issues discussed by participants were: responsibility, organisational behaviour, preferences regarding feedback, interpersonal relationships, decision-
making, mind-set, measurement of success, dealing with frustrations and stress, and women’s behaviour.

All participants mentioned aspects related to personal responsibility and accountability, as well as the immense pride in and satisfaction gained from successful project delivery:

“If you see something needs to be done, you decide, ‘That’s my role, and I will take it up.’”

Due to this sense of responsibility, the PMs often took on additional roles such as vendor education and coaching, to ensure the success of the project.

Another personality attribute all the participants mentioned was the ability to organise, create something new out of chaos, and add value. In the discussions, they often related these traits to ‘Who I am.’

In terms of preference regarding feedback, the participants described themselves as very patient and open to discussing solutions. The manner in which feedback was given varied; however, all the participants preferred honest and direct feedback, describing it as crucial to building good relationships.

In addition, the participants agreed that interpersonal relationships were important. Quite interesting was the variations in approaches to building and maintaining these relationships. Seven participants described themselves as people-orientated, and indicated ease in maintaining relationships. The remainder admitted to following a more process-driven approach, especially in stressful situations. Also, most participants admitted working consciously at maintaining relationships.

A trait frequently mentioned was decision-making ability, where the PMs used combinations of intuition and business skills, backed by concrete evidence. Although all the participants indicated that they did not hesitate in making decisions, the basis for these decisions often varied. In most instances, the main consideration in making decisions was reputational impact, followed by assessment of the impact on cost and quality of delivery. Furthermore, most of the participants indicated that they would resign if they thought a project would cause irreparable damage to their reputation. Only one participant indicated that financial pressure was forcing the participant to remain in a position.
Interesting was that participants who had been appointed as consultants saw themselves as a brand, and therefore took their reputations very seriously. Also, they often viewed themselves as members of an out-group, which made them even more protective of their reputation.

The participants further described themselves as possessing the traits of resourcefulness, teachability, and willingness to work in different environments (both geographically and with regard to business area). One participant remarked as follows:

“*I had no skills set in the German language, so I went very quickly to get past the basics. After six months, you learned it.*”

In addition to an inquisitive mind-set, participants indicated that it was not possible to be a subject-matter expert in everything. Instead, they gained only enough experience in a variety of areas to enable them to lead projects. This mind-set and ability to learn were most often singled out as the most important for success.

When asked how they measured success, most of the participants described success in terms of project delivery and whether the instructing people and organisation were satisfied with the results. Most participants acknowledged that not everyone was able to assess project results. Almost all the participants described unexpected outcomes as a learning experience. One participant noted:

“*[I] just think and learn from it and not make the same mistake again.*”

In keeping with the learning attribute, all participants indicated that they enjoyed working with a variety of cultures, despite frustrations related to language barriers and cultural differences. They valued expanding their cultural experiences. Further, with regard to working with people, it was clear that the attributes of being able to communicate and maintain relationships were important. All the participants mentioned a preference for open and clear face-to-face communication. As also discussed under the *People management* code of the *Industry Knowledge* theme, participants recognised that face-to-face communication is not always possible when working with teams in other regions, and that they had to be flexible in their communication style, using teleconferencing or video conferencing.

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15 Please see Section 3.3.6
Also, regarding relationships, the participants indicated a dislike of internal politics and ‘backstabbers.’ One participant stated the following:

“...someone trying to manoeuvre and lie behind people’s backs to manoeuvre people, that’s a challenging one. That’s the one where I really struggle. So, once it gets to the personal level, yes, that’s the one that impacts me significantly, whether it is in work life or outside work life.”

The female participants described changes in their behaviour to bypass stereotyping, especially in the IT and mining industries, which are still male-dominated. One participant described herself as an “ice queen.” The women felt they had to be more assertive and prepared than their male counterparts. In this regard, one female participant noted:

“I find that, as a woman in an IT environment, you need to show that you can play the game and not be the emotional PMS woman that’s going to throw her toys out of the cot.”

All the participants talked about dealing with frustrations and stress, with some internalising this and others showing their feelings at work. They all had some form of outlet, such as a hobby or exercise to release stress. The ability to deal with stress was described as important to remain motivated and maintain their roles:

“So, exercise is always on there. And I think I find it important that I have to do something in some sort of outlet.”

A code closely related to Traits and behaviour, namely Career picked me, emerged, and is discussed next.

3.5.2 Career picked me

Nine participants, when asked how they got into this field of work, alluded to the career having picked them. Most ascribed this to their personal attributes. The following excerpt is particularly descriptive:

“And that, for me, just shows me it wasn’t a career path I picked. I just do what I do, and do it to the best of my ability. And someone spot it and go, ‘Yes, we can use that, thank you very much.’ As I said, this job found me, rather than the other way around.”

Participants reported doing their work to the best of their ability and that they had a willingness to learn and change. One participant indicated that the opportunity to become involved in this field was due to his interpersonal skills, despite the fact that
he did not know anything about IT. His manager at the time believed that these attributes were very important in learning the technical side. Another participant indicated that his personality was inclined towards project management, as he enjoyed continuous improvement and, as such, the career picked him. Other participants came into the role as one job led to another, and the project management career eventually ‘picked them.’ In only one instance did the participant make a conscious decision to change careers to project management as a business analyst, for financial reasons.

Traits and behaviours are closely related to *Personal values*, as values guide behaviour. Therefore, this code is discussed next.

### 3.5.3 Personal values

Attempting to illicit their personal values, I asked participants what was important to them in their work and personal environment. Most participants had to think a while before being able to describe their values. They also often distinguished between personal and organisational values.

At a personal level, family and the ability to provide well for loved ones were key values. Other values listed were: health, integrity, honesty, and caring. Participants also attached more importance to certain personal values, and described how these sometimes interfered when they had to take appropriate business actions. For instance, one participant described the value of caring as being very important to her. She described situations where she was aware of a team member having difficult personal circumstances, and therefore not acting on non-delivery by this team member. This ultimately had a negative effect on the team effort and on her workload, as she had to perform some of the tasks herself.

Several participants cited the value of quality delivery. They described how the lack of team competence affected the quality delivery and the personal stress it created. This mainly related to their ability to take up their roles and subsequent reflection on their reputations.

Surprisingly, the values of respect for time and being prepared for meetings were raised by several participants, especially the consultants. The reason for this was that consultants sold their time, which made them very aware of its value. They also viewed themselves as a brand, and they explained that a perception of them wasting time could negatively impact their reputation. Other values included the ability to have fun,
acting with integrity, honesty, and respecting people and the organisation. Although the participants indicated a certain tolerance level, almost all of them indicated that they would leave, or had left, if there was misalignment between their personal values and those of the organisation.

Next, we turn to the last code to emerge from the theme *Personal Attributes*, namely *Management style*.

### 3.5.4 Management style

Most participants indicated that they followed an adaptive management style, which they described as understanding outcomes and the underlying processes that influence the schedule and, potentially, the scope of projects. As shown by the association between the codes, *Management style* is influenced by the *Personal values*\(^{16}\) and *Industry knowledge*\(^{17}\). The participants indicated that they had the ability to change their management style by, for instance, redirecting teams or continuing with other aspects while waiting for managerial decisions. The following remark is relevant:

> “Clearly important for any leader, particularly in IT nowadays, is to understand where it may have come from and what it is changing to, and what they need to do to enact that.”

Participants also mentioned strategic thinking and the ability to recognise the bigger picture. Regarding outsourcing, the participants pointed out the need to understand how to utilise the various competencies, the different organisational operating models, and being able to change one’s management style to achieve results. One stated:

> “You’ve got to keep what I call ‘local skills sets,’ because some of that will work, and local knowledge is pretty imperative. [You can] change the track, of course, change in doing it a different way, use a different method to get to the end result.”

It is therefore clear that an adaptive management style is strongly linked with codes of the theme *Leadership Role*, namely *Manage outcomes, People management, Team dynamics, and Role uptake*.

Thus far, the discussion of the findings centred on the various roles the leaders in the context of outsource projects had to fulfil, their work motivation, and their personal attributes. The following themes relate to the competencies the leaders had built

\(^{16}\) Please see Section 3.4.3  
\(^{17}\) Please see Section 3.5
during their career to execute their roles and stay motivated. Attempting to uncover these, I asked the participants what advice they would give someone starting out. The first theme that emerged from the interviews was *Industry knowledge*.

### 3.6 INDUSTRY KNOWLEDGE

*Industry knowledge* and its code network is portrayed in Figure 7, below. The codes *Work experience* and *Outsource knowledge* are closely associated with other themes, such as *Personal Attributes (Management style)*, *Leadership Role (People management)* and *Business Skills (Strategic thinking and Problem-solving)*.

In this study, industry knowledge was defined in terms of organisational knowledge (mining and financial), departmental (IT), and functional (project or programme management) knowledge. In other words, some participants were appointed as PMs in the IT department for a mining organisation, and therefore had industry knowledge of project management, IT, and mining.

*Figure 7. Code network of the theme Industry Knowledge*
3.6.1 Work experience
The participants’ stories of gaining work experience centred on their path to IT and project management, the gathering and maintaining of IT management knowledge, as well as personal skills and circumstances. The code Work experience is associated with the codes Outsource understanding and Problem-solving, with the latter also being a code of the theme Business Skills.

All the participants described the importance of work experience in the mining and financial sectors, followed by specific IT and management experience. As the IT function is an enabler of business, an understanding of business drivers and processes is a requirement to fulfil the role of PM. It was therefore not surprising that the participants described work experience as the main element in gaining industry knowledge. To illustrate this point, eight participants had worked in a business function before moving to IT. Some of the participants had either formal degrees in other areas, such as engineering or management, or had specific functional training in aspects of their industry, which they had completed whilst fulfilling their roles. One participant indicated that this theoretical and business experience assisted him in executing his role:

“…have a very good theory backing behind me to understand the lingo that we use and why we use it, enabling me to be very pragmatical.”

As discussed under the Leadership Role\(^\text{18}\) theme, industry knowledge with specific work experience often proved valuable when participants moved into IT, assisting them in translating business needs to technical requirements. This industry knowledge was described as being of particular importance to those participants who managed projects in the mining industry, as it affected the manner in which they took up their role and project delivery. The following excerpt is representative of this finding:

“Remember, for us, safety is key. Firstly, make sure there is always a safety focus. And ensure you educate the guys on what safety implications apply. And that they include it in their planning in terms of their unique project plans and roles in the programme plan. [It is important that] there is a focus around safety and safety awareness as well.”

\(^{18}\) Please see Section 3.2
At a personal level, the work experience gained whilst working in the operational areas of the business created an awareness with some participants around their job fit. When they realised that there was a mismatch between them and the job they held, they used their work experience to create new opportunities or to avail themselves of available opportunities. Most of the participants described the following informal routes they had taken to gain more IT knowledge. Only two had enrolled for formal IT degrees. A significant number of participants had gained more from on-the-job work experience than from formal training. One participant remarked:

“…then [I] did my degree in computing. I have a bachelor in information technology, which was absolutely useless by the time I achieved it, because I already moved up the ranks.”

Gaining experience on the job also appeared to be one of the reasons why only four of the ten participants interviewed listed formal project or programme management qualifications. Most of the participants had more than 10 years experience in managing projects, and they deemed work experience more useful than formal education. One participant felt that leading outsource projects required both functional knowledge and an understanding of business:

“[It] requires you to have a fairly broad understanding of what the hell is going on and what you are doing.”

The most interesting analogy of the role and work experience required in project management was that of a plumber getting things to flow. It is not surprising that all participants alluded to being prepared to ‘get their hands dirty to get things done,’ which added to their work experience.

In order to gain a variety of work experiences, the participants described personal skills and circumstances as enablers. Nine listed global work experience and the ability to move around geographically, thereby gaining experience in other regions. This extensive work experience (linked to the theme Global Mind-set19) added to the formation of their unique work identity. They ascribed their success to having good interpersonal skills and work experience. They displayed enough knowledge of people and interpersonal relationships to recognise various individual competencies and internal team dynamics, and how to combine these to ensure success in project delivery. Most participants stated that they carefully chose with whom they collaborated. On participant noted:

19 Please see Section 3.7
“If I have to partner with some people, I chose my partners very carefully, particularly on the integration side.”

3.6.2 Outsource experience

An understanding of outsourcing was necessary for the participants in managing the complex structures specified in contracts. Previous outsource experience was directly associated with work experience in the industry, and enabled the management of vendors, communication with stakeholders, and delivery of requirements. Although some participants expressed reservations about outsourcing, they all agreed that the nature of IT delivery is becoming more service-orientated. One participant expressed this as follows:

“…the nature of how business IT is delivered today is now moving into a commodity-based component as a service.”

The reasons for reservations about outsourcing cited by a number of participants were: loss of control, additional overheads in terms of the contract, and an unwillingness to share sufficient information with vendors. One participant stated:

“The moment you start moving that project out of your domain, you start losing intellectual property. So, again, we kept everything very close. You play your cards close, and you manage the vendors up to a point.”

However, the participants used their work experience and personal skills to collaborate with vendors in delivery.

“Vendors are often scapegoats for when things go wrong… So, it is collaboration, it is working with, them rather than at them. Rather than whip people, work with them to make things happen.”

Irrespective of the participants’ views on outsourcing, all agreed that each vendor should be approached differently. One participant explained:

“There are different ways that I approach my different vendors. With some vendors, I have to give clear direction. With other vendors, I leave it up to them.”

Finally, all agreed that work experience and outsource knowledge were gained over time:

“…experience you gain through time. I will have most probably used a totally different approach if I need to start afresh with a new company, because then you don’t know the vendors that you sit with.”
Having outlined the theme *Industry Knowledge*, we now turn to the competence-related theme *Business Knowledge*.

### 3.7 BUSINESS KNOWLEDGE

As illustrated in Figure 8, below, the theme *Business Skills* includes the codes *Experience/Competence, Manage ambiguity, Strategic thinking, Informal/Underlying processes, Communicate expectations, Problem-solving, and Project focus*. *Manage ambiguity* had the highest grounding (G66), followed by *Experience/Competence*, with a grounding of 65. Due to the complex nature of outsourcing delivery, *Problem-solving*, which is also a code of the *Leadership Role* theme, had the highest density (D20).

![Figure 8. Code network of the theme Business Skills](image)

#### 3.7.1 Experience/competence

The nature of outsource project- or programme management demands the fulfilment of diverse roles and functions at any given time, which requires extensive business
experience. This was underlined by the high grounding of the code Experience/Competence.

To lead complex inter-organisational teams, a broad understanding of not only internal organisational business processes, but also vendor processes is required. As discussed under the theme Industry Knowledge\(^{20}\), the participants indicated that most of them had gained training and work experience in another functional area in business before moving to IT.

The participants’ experience was further enhanced by working in teams comprising of a variety of cultures, adding to their ability to navigate and lead offshore teams. They reported playing a role in linking teams in IT and business fields, and in vendors. One put it as follows:

“…sort of a liaison role between the operational side and the IT team, defining needs and converting it into requirements.”

Experience was also highlighted when I asked how they knew which role they should focus on at any given time. Three participants claimed having developed a "sixth sense" in this regard. Not surprisingly, the participants claimed that experience helped them to prioritise roles. The following statement was offered:

“That’s just experience. You don’t know. Sometimes you must be in line and in sync with your sixth sense as well. It is difficult to answer. You don’t always know.”

When asked what they did if they did not have the necessary experience, one participant admitted to just "winging it" and learning from the experience.

The participants had a wide variety of business backgrounds, with competence in various areas. Their experience led to their understanding of business processes and organisational cultures. Although they found some processes frustrating, they used their experience to manage both their behaviour and influence their environment. They reported that, through experience, they understood what is “real” and what is “noise.”

The analysis indicated that PMs with more diverse experience and longer service in the industry seemed to manage their work identity better. Also, their identities seemed based on what they did (objective), as opposed to on who they were (subjective).

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\(^{20}\) Please see Section 3.6
Business experience is closely associated with Problem-solving, the next code we examine.

3.7.2 Problem-solving

Problem-solving occurs during the project life cycle and is part of the leadership role\(^{21}\), requiring business experience, which is why it was also included in this theme. In the context of outsourcing, solving problems could relate to people, processes, technology, contracts, or regulatory aspects, requiring of leaders to make use of an array of skills. All the participants reported enjoying the challenge of solving problems related to the outcome of a project. One participant indicated getting too involved when challenges arise and deliverables are not realised. He stated:

“I tend to try to do the business analyst work. If I see that the spec the business analyst is writing is not to the standard, I sometimes get involved in the analysis more than the project management work.”

In contrast, the more experienced PMs used the role type of either project- or programme manager as an indicator of the level of involvement required of them in solving problems. Most of the programme managers interviewed managed a few projects in a programme, and only got involved as a final escalation to resolve problems.

“I couldn’t get so involved, so it was mostly meetings, it was clearing the shit, was sorting out the finances, it was making sure the budgets were right. It was making sure everything was understood clearly. I guess I was the final escalation point on that project. It was up to me to say, ‘You’ve got it wrong or they’ve got it wrong.’”

However, the participants reported that their preference was to be more involved in problem-solving, but, due to other priorities, they had to trust their colleagues. One participant stated:

“Being more involved … actually like to have my hands on and like to be involved.”

The participants viewed problem-solving as a positive challenge. This aspect was mentioned often, with participants identifying themselves as problem-solvers. This was described as follows:

\(^{21}\) Please see Section 3.3.4
“Well, every day you get different scenarios, IT problems, and people that make it a challenging job. But in a good way … not in a negative way. Challenging job.”

Nine of the participants indicated that they would not leave a project when faced with challenges or problems. One expressed this in the following way:

“No, I am not the type of person that leaves. I am not a leaver. I never left anything. I am not a leaver. I just try and make it work. That’s my position, that’s my role, and [I] try and make it work.”

One participant reported that, if a project was not viable, he would want to leave, but would remain for financial reasons. This attribute of staying when faced with challenges was also present instay the Work Motivation theme already described.

All the participants described problem-solving as a business skill they had acquired and enhanced through experience. However, this also had the potential of creating additional personal stress through the PMs taking on additional roles; in these instances, business- and industry experience clearly came to the fore. For instance, those participants with more experience indicated that they trusted their teams to solve problems, and only acted when problems were escalated.

In the present study, the definition of Problem-solving related to PMs’ thinking abilities (Global mind-set), knowledge about when to get involved (Role uptake), as well as to their understanding of the processes that influence project progress. Finally, the analysis indicated that project challenges requiring facilitation and innovation were the strongest personal motivator in building their work identity.

The capability to solve problems led to the next code, Strategic thinking, which is discussed next.

3.7.3 Strategic thinking

In addition to solving problems, the participants reported the ability to think strategically about their work environment and engagement with the various stakeholders. For the purposes of the present study, strategic thinking not only entailed problem-solving, but also thinking at different levels (global versus detailed thinking), whilst considering all aspects of implementation in a project.
During the coding process, I noticed the participants speaking of strategic thinking when describing their outsourcing preferences. I also noticed how the participants’ described their thinking, switching between strategic and detailed thinking. The PMs realised that, in order to deliver, they needed to look at the bigger picture. One explained this as follows:

“So, for me, it is much more now: ‘What’s the actual business objective? Where are we going? How does it fit the bigger picture?’ It is my own maturity that I could gain.”

Irrespective of their views on outsourcing, the PMs indicated that strategic thinking was one of the most important aspects of managing outsourcing. The PMs recognised the underlying process, and felt that it needed to be negotiated within the outsourcing space, especially when vendors try to strategically meet their own needs and objectives. Some of the participants reported disliking strategic manoeuvring by vendors and team members:

“But, if I’ve got someone trying to manoeuvre and lie behind people’s backs to manoeuvre people, that’s a challenging one. That is … where I really struggle. So, once it gets to the personal level, yes, that’s the one that impacts me significantly, whether it is in work life or outside work life.”

While manoeuvring often created distrust and affected team interaction, the participants accepted it as part of the working landscape.

The participants said that the size and complexity of the project influenced how much time they would devote to strategic and detailed thinking. For instance, there was more time to get involved in the details when managing small projects as opposed to programmes. One participant described this as follows:

“I think it is a balance of both, to be honest, and the end of the spectrum where you sit, it is probably the type of project.”

The manner of thinking, that is, an indirect, diplomatic, or detailed management approach, varied and influenced the leaders' behaviour. They indicated that technical people cannot always be strategic thinkers, and that they had to change their approach to leading teams and explaining their decisions. The following excerpt provides a good example of the participants' thoughts in this regard:
“…there are a lot of personalities or consultants who are quite technical in their area and understand their area, but, if it’s a decision that’s impacting something broader, they’re not capable to make a strategic decision.”

The method most frequently cited by when leading teams and gathering information to make decisions was posing open-ended questions, with the aim of obtaining a variety of viewpoints and, at the same time, ensuring collaboration. The following excerpt provides a good description of this approach:

“…ask some open questions that don’t have a yes or no answer. Or giving people a viewpoint and asking them to review their viewpoints. Sometimes, it’s asking the client to come to you and, if they don’t, sometimes I go to the client with a skeleton of something and ask them, basically, to give feedback.”

The participants generally applied strategic thinking in role uptake, which enabled them to expand their knowledge of their own industry and business, as well their personal job planning and growth. They spoke of “loving managing the bigger picture.”

I observed that personal thinking preferences, coupled with the participants’ described business experience, were linked to the extent of the participants’ strategic thinking. Some participants described personal growth in terms of shifting to more strategic thinking when planning and ensuring team viability. However, one participant described his personal thinking preference as detail-orientated; he employed strategic thinking in planning, and then, in executing, quickly move to detailed thinking.

Taking the discussion regarding strategic thinking as a whole, the following may be highlighted: First, industry experience, business knowledge, together with individuals’ personal resources and EQ, were linked to strategic thinking22. Second, participants indicated that team members’ perceptions of what the project outcomes are differed, and, finally, the participants used their business experience, together with facilitated processes, teamwork, and stakeholder engagement, to realise outcomes.

We now take a look at the code Manage ambiguity, which I derived from the participants’ accounts.

22 Please see Appendix 4.
3.7.4 Manage ambiguity

As indicated in Chapter 1, it is not possible to make provision for all possible incidents in outsource contracts; therefore, the scope of work is often not clear, neither are the requirements for communication with regard to meeting deliverables (Davies, 2015; Nooteboom et al., 1997). This is especially true where the scope of delivery is large and team members are in different locations. Also, it must be borne in mind that stakeholders, due to differences in departments or business structures, often have varied opinions on the outcomes. One participant explained:

“Because our business is so different, to have one configuration that works for everybody is just not going to happen.”

It was for this reason that a number of participants preferred ‘insource work’ or work performed within the organisation, which facilitates achieving outcomes quicker. In this regard, one participant noted:

“When you insource, you just do whatever you need to do to get the job done.”

As already pointed out, leaders’ roles included both leadership and managerial aspects (Achua & Lussier, 2013). One participant described the process of managing outsource projects as challenging, requiring continuous adjustment and acceptance that provision cannot be made for everything. Maintaining one’s judgement and trust in inter-organisational teams requires flexibility and constantly verifying facts. The following excerpt, compiled from a participant’s account of a typical day, describes this dynamic:

“A typical day is telling people what you expect from them, and it’s always adjusting things… In the project landscape, it’s about changing. The IT world is realising and sort of accepting that you can’t plan everything upfront, because it is so much detail… Change is not necessarily a bad thing. If you are a good project manager and you know that, as you have been years in that, then you accept change. The thing is, sometimes, your management does not accept change, and then you have to sort of wiggle around it a bit… That’s what you do when you’re a project manager. You can’t plan everything, but you try to plan as much as possible.”

Most participants reported that, when managing ambiguity, they tried to treat team members similarly. They accepted that the team structure would include people with different mental models and work preferences, for example, some people function
better when work is clearly defined, while others manage complexity. These interpersonal dynamics and individual approaches to work could influence trust and perceptions of competence. One participant put this as follows:

“Ability to manage self and team when clear scope and outcomes are not defined. The leader has to manage team expectations, problem-solve on the go, and interpersonal dynamics, as some people work better when outcomes are defined. This could potentially influence trust and how trust is defined or redefined and perceived.”

In addition, ambiguity extends to team structures, with vendor resources not reporting directly to the project manager. These vendor resources might also have other priorities, related to the vendor organisation. Participants reported that the latter affected their views of their own ability to manage projects and meet deadlines. These perceptions influenced how PMs managed stress, solved problems, planned, and maintain interpersonal relationships with vendors. The following quote supports this finding:

“Well you try to treat them all the same. But, what is difficult, is that you are not the line manager, so, sometimes, you are not asked for permission to approve leave … or training or things like that…. You normally only see their ‘Out of Office’ message come around. And then it is a critical stage of the project, and they are off on training or off on leave. So, that is very frustrating, particularly with resources from India, where they sometimes have to go because their visa has expired. It is like an open end, you don’t know.”

Another form of ambiguity mentioned was managing business leaders’ expectations. Unrealistic expectations often require re-planning. On a personal level, all the participants mentioned various levels of frustration during this process. They claimed that, due to experience and their business skills, they could manage the process. One participant stated:

“Very, very difficult to handle that. The only thing, you know, is to take people back to the drawing board and show them all the dependences and put that on paper and, like, you know, renegotiate… You sort of have to lead somebody and, like, show them, you know, ‘How did you get to this decision? Explain to me.’ And, if they can’t do that, then you have to say, ‘What about this, did you think about this, did you think about that?’ And then they somehow realise that it was not realistic.”
As shown in the findings leaders have to be able to manage ambiguity in various forms, such as scope of the project, planning, team dynamics, stakeholder involvement, delivery expectation, and perceptions of trust. In order to lead, leaders have to constantly manage the self, readjusting and renegotiating their identity.

The next code that emerged from the analysis of the interviews was Informal/Underlying processes. As part of the theme Business Skills, it was associated with the following codes: Strategic thinking, Project focus, and Problem-solving.

3.7.5 Informal and underlying processes
Several participants cited both formal and informal or underlying processes existing within group structures. These underlying processes might differ with regard to macro- and minor group settings, for instance, where organisations or team’s value processes like speaking up and diversity thinking, national cultures might not encourage these. An example is the following description of a participant of leading projects in Japan:

“…Japanese women working for us, and they were complete subjugated even below us, which was very confronting for us … as we dealt with them as equals and peers. Yet, when they were dealing with the Japanese culture, all they had to do was say something in Japanese and we would be blind-sided.”

The participants indicated that failing to recognise informal and underlying processes could result in them being cut out of informal team conversations, thus becoming part of an out-group, which, in turn, might affect project outcomes.

In addition to organisational processes normally described in procedure manuals, various other informal processes exist that are not included in official documents. An example is the internal decision-making process. Several participants described how they negotiated these underlying processes and how it affected their work identity when, due to some informal process, managerial decisions were not forthcoming. Some stated that these processes “set them off,” whilst others displayed more flexibility, and moved on to other tasks.

The aspect of problem-solving was discussed above, but it is important to look into this further. The participants highlighted their awareness of how underlying processes influenced how they were perceived as a leader, and how this perception affected their ability to influence stakeholders in reaching project outcomes. Being aware of their
self-image and external views added to the pressure they experienced in maintaining their work identity. For example, some believed that, if they were unprepared, others would perceive them as wasting people’s time, which might result in them losing people’s co-operation. One participant put this as follows:

“.. if people see this as a waste of time, they are not going to attend future meetings. So, you have got to prepare properly, and you’ve got to make sure that you document the outcomes of the session properly, so that people think it was worth it. You have to respect time.”

The code we turned to next, Project focus, is an important business skill the PMs had developed in dealing with ambiguity and remaining focussed.

3.7.6 Project focus

It was easy for the participants to get involved in solving a problem that they neglected other aspects of their roles. It is not surprising that Project focus is associated with all the other codes of the theme Business Skills, because the PMs fulfilled various roles. The participants generally indicated that projects were affected by underlying processes. They shared that they tended to focus on delivery, and did not really get involved in aspects that might distract from the outcome. One participant stated:

“I just focus on the role at hand and try to deliver on the goals of the project.”

However, one saw himself as quite impatient as a result of ageing, and that, consequently, his focus on project success had shifted somewhat. An interesting view provided another participant was that of congruence:

“I think congruence. When I say congruence, I mean people working for a common goal. I think that, for me, is what I have enjoyed in any of the work that I have been involved in, whether it’s a business role or a project management role. When you have everybody pulling in the same place, it is very rewarding and often very successful.”

All the participants described a tremendous amount of focus and a great sense of self when having delivered successful projects. One put it in the following way:

“I reflect … on ideas, and I am very focused … when we down-tools and have a great sense of oneself.”

At this point it, is necessary to consider the relationship of project focus with personal thinking preferences and leadership styles. It is clear that the participants displayed a
degree of servant leadership. In maintaining project focus, they demonstrated EQ\textsuperscript{23} with regard to reality checking and remaining flexible. Their ability to remain focussed reflected a business skill related to their leadership experience and collaboration with project teams. While they used different strategies to maintain their project focus, it clearly added to their sense of self.

An unexpected business skill resulting from the analysis was the code Communicate expectations. This is the last code in this theme, which we look at next.

3.7.7 Communicate expectations
Similar to the code Clear outcomes\textsuperscript{24}, discussed above as part of the theme Motivation, is Communicate expectations. The participants most referred to communicating with team members and explaining their expectations clearly. From what the participants shared, it was clear that their communication preferences differed. Some participants indicated that they were very direct in their communication, which was appreciated by the vendors. One participant stated:

\textit{“I have had some robust, robust, robust conversations with the guys at [Company O], and they actually told me afterwards that they actually appreciated it, because it just keeps them in check, too.”}

Others used a more diplomatic approach, which related to coaching. One participant explained it as follows:

\textit{“If I did not like something, I thought it would have a little bit of an issue or a bit of a gap in it, I explained to them what I thought about it.”}

A further two participants indicated that their approach was leading people while at the same time solving problems. They provided critique as an indirect strategy, and emphasised self-management in leading. One participant said:

\textit{“I try to be indirect with critique. I take people back to the drawing board, show them all the dependencies, put that on paper, and renegotiate.”}

In contrast, another participant felt that vendors were experts who should deliver. He explained as follows:

\textit{“We are paying them [vendors] a lot of money. Those guys are adults; they have all kinds of titles. I assume that those people are doing what}

\textsuperscript{23} Please see Appendix 4.
\textsuperscript{24} Please see Section 3.4.1
they’re supposed to do. That’s why I am much more impatient now than I was when I was younger, and sort of intolerant towards those things.”

Another participant shared the latter sentiment to some extent. He said that he did not tolerate incompetence, and would ask vendors to remove a person if the communication was not affective. He stated:

“But I don’t allow incompetency… So, if somebody is completely incompetent for the role, then that person definitely does not stay in the role.”

In addition to their communication approach, the participants’ methods of communication varied. Eight participants preferred short meetings to discuss actions, while others would have discussions either with account managers or directly with team members.

The participants agreed that e-mail is not an effective means of communication, and one even went as far as describing the ideal work situation as one with no e-mail communication. Another form of communication was management reporting. Here, the participants would have short daily stand-up meetings with the whole team to ensure everyone understood their daily targets. This he described as “creating a vibe” to encourage team members to help one another to reach the targets. He said:

“There is, like, a vibe that comes in that people just want to make it and they want to achieve it. And that was very rewarding, because, sometimes, you think that target is impossible, and then, at some point, you see that it is reachable, and then it is just very nice.”

He continued:

“I found it very frustrating in other organisations where there is no MI [management information] that is available on a daily basis… MI in other places were only for management, and, I think, if you make that available to a lower level, the process manages itself.”

Everyone agreed that the same messages should be communicated to all stakeholders. It was pointed out that, when incorrect information was communicated to a business function, it created stress. The example given was an incorrect date of delivery. One participant commented:

“You are given an unrealistic project from the beginning. The scope, budget, and timeline is unrealistic. What I also find frustrating is that people
in business communicate dates to people without taking all the dependencies into consideration. Once you have communicated a deadline, although the date may not be cast in concrete, when you have to give a date, it is cast in concrete. People don’t forget that date.”

During follow-up interviews, I wanted to know how the participants managed perceptions and expectations. They mentioned using a process of facilitation, leading stakeholders to an understanding of various project dependencies and, where applicable, explaining that expectations were unrealistic.

They also shared the following strategies: (i) having direct discussions regarding expectations and misalignments, and not shying away from difficult situations; (ii) their communication varied from being direct, to diplomatic, to coaching; (iii) they indicated preferences for communication ranging from short weekly meetings, one-on-one conversations, to stand-up meetings; and (iv) interaction was either face-to-face, or audio or video calls, rather than in e-mails.

At this point, it should be clear that developing business skills was a prerequisite for leadership in the complex environment, with business experience being the leading skill impacting on leaders’ ability to solve problems, manage ambiguity, maintain focus, thinking strategically, recognising underlying processes, and influencing outcomes and team dynamics. These PMs recognised the need for clear communication, and had developed various methods to relay messages. These business skills were part of these PMs’ developmental journey over time, forming their work identity.

Having discussed the Business knowledge theme and its accompanying codes, we now turn to the theme Global Mind-set.

3.8 GLOBAL MIND-SET

From inspecting the participants’ accounts, it became clear that the PMs led complex inter-organisational teams. In reviewing and coding the participants’ experiences and perceptions related to globalisation, I made use of viewpoints and positions offered by the Association for Talent Development (ATD). These included: accommodating cultural differences, conveying respect for different perspectives, expanding own awareness, adapting behaviour to accommodate others, championing diversity, and leveraging diverse contributions (Association of Talent Development, 2014). This
resulted in the following codes: *Cultural work differences, Other processes, Complex team structure, Thinking diversity,* and *Expanding own experience.* These codes and their relationships are shown in Figure 9, below.

![Figure 9](image)

**Figure 9.** Code network of the theme *Global Mind-set*

### 3.8.1 Complex team structures

The participants referred to outsourced projects including various vendors with teams in different locations, as well as their own organisations’ cultures and country cultures. These formed the basis of what I termed *Complex team structure.* The code is associated with all the other *Global Mind-set* codes, as well as with the themes *Leadership Role* (Codes: *Role uptake* and *Team-building*), *Interpersonal Skills* (Code: *Stakeholder engagement*, discussed in the next section).

Participants reported that to communicate effectively required an understanding of the background of the project, the various teams’ compositions, the organisations, and the impact of change on the client organisation. The following excerpt contextualises this:
“...clearly, important for any leader, particularly in IT nowadays, is to understand where it may have come from and what it is changing to, and what they need to do to enact that.”

In addition to vendor structures, the PMs had to understand the milieu of the client organisation, and had to have good interpersonal skills. Some participants alluded to differences in working in the educational sector versus working in the financial sector, and noted that they had had to adapt their management style. One participant said:

“…universities, it is consultative and collegiate. If you don’t have a PhD, you are actually not very high in the pecking order. [You have to show] you are actually bringing something different in terms of helping the life of your customer.”

As mentioned, the medium of communication used for interacting with team members added to the complexity of the team structure. As team members were often in different locations, communication often took place via Skype, or video- and audio calls. Such communication brought challenges, such as poor voice or picture clarity, delays, and connectivity issues. Participants related that audio calls could be especially challenging, as there were no visual cues, people often talked at the same time, or a person’s foreign accent may be difficult to understand. Solving technical problems also took longer when people were not in the same location. The reason for this was that a technical solution could not be drawn on a white board and exchanged during a workshop. It therefore sometimes took a few iterations of distribution of the solution and discussing it in successive audio calls. Attempting to address diversity, PMs had to remain focused on outcomes, display patience, and develop good listening and interpersonal skills. The participants pointed out that these situations required setting clear boundaries and allowing diversity thinking to provide all an opportunity to participate.

The code we turned to next describes the ability to manage Cultural work differences.

3.8.2 Cultural work differences
The participants pointed out that cultural work differences were mostly related to the global mind-set of leaders. From the participants’ accounts, it was clear that the ability to recognise the differences in work cultures, brought about by national and organisational cultures, was a key leadership requirement. These differences were especially evident in complex inter-organisational teams comprising people from various countries, organisations, and work environments. When leading such teams,
the PMs were required to recognise their members’ diversity and to appreciate various
cultural negotiation- and decision-making processes. Not only did this enable leaders
to better effect team cohesiveness, but it also enabled them to influence managerial
stakeholders when they required their support. The following description provided by
a participant is relevant:

“Japanese [culture] … is very strong hierarchical. It comes back down to
one decision-maker making the decision based on a number of Japanese
people coming to agreement and presenting that to the person at the head
of the table. So, we presented it to the lower levels and waited for the
decision to come back down the food chain.”

In addition to building teams, an understanding of cultural differences assisted the PMs
in planning, including potential delays, as explained in the following excerpt:

“…the company I am working for, the vendor is in Greece. So, now, with
the Easter weekend, Easter is very big in Greece, because they are
Catholic, so, from the Thursday to Tuesday, it was more than just an Easter
weekend. People are just not available.”

Several participants made mention of personal flexibility. One participant cited his
experience whilst working in Singapore and the skill required to manage Western and
Eastern thinking and behaviour. Others explained the need to change leadership
styles, for instance, where a directive management approach was required. This was
narrated as follows:

“…Singapore, working for a Western company in an Eastern culture, so,
therefore, you had a lot of process-orientated people underneath you, but
who did not quite think outside the box. So, it was very easy to give them
task-based activities, and you could set the direction and the action.”

Another participant described conflicting behaviours at national and internal team
levels. The participant described how he had to alter his behaviour during internal
team interactions as opposed to when interacting with the same team members in front
of their superiors. These diverse cultural situations required high levels of self-
awareness, especially in managing his own reaction to ensure that his actions were
not offensive in certain cultural situations. During the interview, this participant said:

“…Japanese women working for us, and they were complete subjugated,
even below us, which was very confronting for us … as we dealt with them
as equals and peers. Yet, when they were in the Japanese culture, … we
were completely blindsided.”
The participants emphasised the importance of understanding cultural diversity, self-awareness, self-management, and flexibility when leading diverse cultural teams. In addition, they acknowledged that their personal views with regard to assessing competence might not be accurate, for example, due to language barriers. Although they found cultural work differences frustrating, most participants enjoyed experiencing these, as it contributed to their personal growth.

Next, we turn to the code Other processes.

3.8.3 Other processes
The code Other processes relates to organisational processes in the participants' own organisations, as well those in vendor organisations. Here, a global mind-set refers to leaders’ flexibility in managing inter-organisational teams, whilst recognising differences. It includes acknowledging internal politics in vendor organisations and an awareness of governance processes, and how these might impact delivery.

Some participants commented on clients insisting that vendors follow organisational processes. As discussed under the code Manage outcomes25 (theme: Leadership Role), they pointed out that this slowed delivery while adding little tangible value, and did not allow vendors to add their industry knowledge to outcomes. In these instances, the PMs used interpersonal relationships to understand vendor processes, placing themselves in a better position to guide vendors and internal stakeholders to reach an acceptable compromise. One participant explained:

“They have got their own internal process and end up doing both [vendor and client processes]. The right idea would be to say, ‘Here is all the things we need. You can you use it for one or the other, but not both’

All the codes in the Global Mind-set theme were related to the code Thinking diversity, which is discussed next.

3.8.4 Thinking diversity
Thinking diversity is associated with all the other codes in the Global mind-set theme. The definition of thinking diversity is the ability to think differently and to recognise and accept that the diverse thinking of other people is influenced by leaders' personal backgrounds, values, beliefs, work experiences, and viewpoints. The participants pointed out that thinking diversity not only allowed for more innovation, it also helped

25 Please see Section 3.3.1
to solve problems the project might encounter. They added that diversity affected interpersonal relationships, which, if not managed correctly, could influence the outcomes of projects. Complex inter-organisational team structures, coupled with work ambiguity and constant change, required of the PMs to develop and apply the ability to think diversity.

When asked how they did this, the participants described a variety of strategies. Some indicated being open to discussions when faced with challenges, and pointed out that, although team members would not always agree with one another, they agreed on resolutions. One participant remarked:

“...we didn’t always agree on stuff, but it is totally fine by me. We could have some robust discussion, we didn’t always agree on everything, which is fine and that’s healthy.”

Another participant ascribed the success of his projects to understanding vendors’ backgrounds and processes:

“I couldn’t have done that with them not having worked with them and learnt how they operate in the background and try to match into us.”

From the participants’ accounts, it was clear that their business skills, industry knowledge, self-awareness, and acknowledgement of cultural differences influenced their ability to think diversity. All the participants described changes in management style and behaviour when faced with cultural diversity. One put this as follows:

“...clearly, important for any leader, particularly in IT nowadays, is to understand where it may have come from and what it is changing to, and what they need to do to enact that.”

Particularly interesting was the participants’ comments on how diversity affected their own performance and behaviour. Some spoke of certain cultures where teams only did as they were told and were not allowed to come up with ideas. Here, the PMs changed their management style and provided task-based directives:

“...who did not quite think outside the box. So, it was very easy to give them task-based activities, and you … set the direction and the action.”

Other participants cited other national cultures being entrepreneurial and good at problem-solving, which allowed innovative thinking and the proposal of various solutions. All agreed that harnessing diversity enhanced outcomes.
Other points made by the participants were that low levels of organisational maturity, with low levels of team work and insufficient organisational processes, affected their ability to think diversity, and that their role uptake was detrimentally affected if a culture was not open to new ways of doing things or did not allow the voicing of opinions.

The ability of leaders to think diversity and their contact with various cultures led to the code *Expand personal experience*, discussed below.

### 3.8.5 Expand personal experience

*Expanding personal experience* relates to the ability of leaders to expand their experience through learning and accepting new roles or positions. It is related to *Cultural work differences*, *Complex team structure*, and *Thinking diversity*.

Almost all the participants mentioned taking advantage of opportunities to expand their own experience, and referred to the enjoyment this provided. One said:

“...shows me it wasn’t a career path I picked, I just do what I do, and do it to my best of my ability.”

In line with the above, one participant had moved to Europe, America, and Asia to experience managing outsource projects in different geographical regions and cultures. This participant stated:

“Effectively, I basically wanted to test myself in terms of not being just in one jurisdiction, Australia, but going to another.”

These participants viewed every project as different, and noted that they were flexible regarding expanding their experience. This was summarised in the following statement:

“Every project which you do is completely different from the previous one that you’ve done, so, your general knowledge in business, insurance, banking, or whatever industry you are in grows a lot with you in every project.”

### 3.9 INTERPERSONAL SKILLS

The final leadership competency is the theme *Interpersonal Skills*, which relates to all the other themes, but is closely associated with the code *Experience/Competence* of the *Business Skills* theme.
As illustrated in Figure 10, below, the codes that emerged with regard to this theme are: *Interpersonal relationships*, *Communication style*, *Stakeholder engagement*, and *Ability to influence*.

Figure 10. Code network of the theme *Interpersonal Skills*

3.9.1 Interpersonal relationships

*Interpersonal relationships* is one of the dimensions of the Bar-On Emotional Intelligence (EQ) Model (Stein & Book, 2006), which relates to a leader’s emotional maturity.

The participants pointed out that their ability to build interpersonal relationships made it possible for them to start in IT and to move between positions and add to their business skills and experience\(^{26}\). In addition, they ascribed their growth in personal

\(^{26}\) Please see Section 3.7.1.
mastery and increasing their EQ\textsuperscript{27} to their ability to recognise diversity within teams. One phrased this in the following way:

“Different people do things different ways, and you have to be able to acknowledge a person for who they are. So, you manage … according to that.”

It was pointed out by the participants that, in addition to establishing interpersonal relationships within teams, being friendly and becoming friends with team members were important. One participant held the view that he worked better when he was friends with team members, and that interacting at work can be separated from interacting socially. However, he acknowledged that this was not easy when he received negative feedback.

Other participants indicated that they would become friends with some team members, but not with others. This they ascribed to the natural progression of interaction between people. Two participants said that they preferred not to socialise outside of the work environment. One participant said:

“I am not big in having to socialise outside of work to keep good dynamics. That is not how I operate. But, within the workforce, I … have a huge respect for people and allow people to make mistakes, allow people to have problems, help out where possible, but also make sure that people are driven to achieve their ultimate goals that are in place.”

Participants also described a preference to pick their own teams. These teams include people they interacted with well and trusted. One participant commented as follows:

“[I] cherry pick the right person for the job to ensure success?”

From the participants’ accounts, it was clear that leaders working in the South African context emphasised BEE policies. They cited certain instances where team members were appointed based on race rather than competence. As they pointed out, such instances affected interpersonal relationships and trust. They said that this frustrated them. Also, these circumstances reflected negatively on their performance. In sharp contrast, leaders working in regions such as Australia, Europe, and India readily replaced team members when they did not fit in with the team or did not have the required competencies. As already discussed with regard to the theme \textit{Global Mind-}

\textsuperscript{27} Please see Appendix 4.
participants described how understanding cultural differences and different personalities affected interpersonal relationships and trust.

The participants pointed out that encouraging vendors and team members to ask one another for assistance required strong interpersonal bridges. One participant said:

“Most of the time, they are friendships too, but they can be very strong bridges of business relationships that you need to form, so that you can pick up the phone and say, ‘I need the following, and your help on this because of that,’ and it just happens.”

Finally, the participants cited management support as crucial to project success. As one pointed out, this is often achieved through interpersonal relationships and building trust to allow managerial influence:

“I got sponsorship from [Company Y]. I explained that this was the way we were going forward, and they were quite comfortable with it.”

3.9.2 Stakeholder engagement

Stakeholder engagement emerged as the code with the second-highest grounding in the theme. This code entails the ability to engage with multiple vendors and internal teams to influence and communicate expectations, as described in the theme Leadership Role, under the code People management.

The participants reported working with various vendors simultaneously and having to build different types of engagement in a very short period, requiring a variety of communication styles (to be discussed in the next section). The ability to engage with stakeholders required business skills, industry knowledge, a global mind-set, and role efficacy.

The number of stakeholders involved in outsource project increased complexity with regard to decision-making and planning. This was frequently cited as delaying progress. The participants pointed out various strategies to manage these obstructions. One described creating small work packages and managing skills closely:

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28 Please see Section 3.8.
29 Please see Section 3.3.6
“[We create] task-based projects or programme assignments, very small pieces of work, fixed-based, some of them come in on a skills set, and we would simply manage them on that skills set outcome.”

Managing stakeholders required leader self-awareness and the knowledge to interpret and understand interaction with various personality types, for example, leading proactive vs reactive team members. In this regard, one participant stated:

“A proactive person will tell you, ‘I have already done this, this, and this. I actually went to order this ahead of time.’ Where a reactive person is, ‘Did you order it? No, not yet? I will probably do it tomorrow.’ Then I start micro managing them.”

As illustrated in the preceding paragraph, the manner of engagement varied, with some PMs preferring micro-managing people, while others were more outcome-focused, leaving the team to self-manage. The participants all pointed out that they expected proactive, direct communication. Some preferred delegating. One participant said:

“I like delegate and empowering.”

One participant outlined the clear boundaries he set for vendors and for himself, and the recognition of people-fit his own life.

Many participants described the effect of internal political agendas on their stakeholder engagement. This type of manoeuvring was linked to a personality type, and the participants reported including this in their stakeholder management. One participant commented:

“…in the manoeuvrings I have experienced, whether it’s the vendor, whether it’s the company, whether it’s specific people. That manoeuvring is not so much a company-specific thing; it is always the personality type, so, you put that person anywhere again, he will be that sort of manoeuvre.”

The code **Communication style** is discussed next.

3.9.3 Communication style

**Communication style** relates to how leaders expressed themselves, communicate expectations, encourage innovative thinking, and build teams. **Communication style** occurred in all the other themes, but especially in describing leadership roles such as managing opposing vendors or different business units.
Most participants interviewed followed a collaborative approach. One participant used a collaborative communication style and approach to find solutions and reach outcomes. The participant remarked:

“…an adaptable leader or manager that can say, ‘Okay, in this instance, the process won’t work, but we still need to get to an outcome. How do we get there?’”

The participants related instances of witnessing colleagues screaming and blaming vendors. However, they also reported incidents where vendors expressed appreciation for respectful and direct conversations. For instance, in cases where processes or implementation did not yield the expected outcomes, the PMs changed their communication style to one that is more direct and robust.

Participants indicated being flexible and understanding various cultural differences (national and cultural) in adopting a communication styles. The participants also reported changing the communication style to include coaching where required. One participant said:

“If I did not like something, I thought it would have a little bit of an issue or a bit of a gap in it, I explained to them what I thought about it.”

The final code in the theme was Ability to influence.

3.9.4 Ability to influence

Ability to influence relates to all the other codes in the theme. It appears in the Leadership Role theme, particularly with regard to the ability to Manage outcomes by using interpersonal skills to build team cohesiveness.

The participants generally described their ability to influence as creating win-win situations. They linked this ability to their work experience, interpersonal skills, and leadership styles. The range of their influence was related to the interpersonal relationships they had developed within the organisation and with vendors. One participant pointed out that his lack of control of the availability of resources of the vendor affected his ability to influence outcomes on the project. He said:

“Well, you try to treat them all the same. But what is difficult is that you are not the line manager, so, sometimes, you are not asked for permission to

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30 Please see Section 3.3.1
approve leave and leave for training or things like that. And when you’re at critical stages of the project … you normally only see their ‘Out of Office’ message come around. And then it is a critical stage of the project and they are off on training or off on leave…”

When asked how the inability to influence vendor resources affected them, eight participants indicated they did not take it personally, while two expressed personal stress. Finally, the participants stated that they had the ability to form relationships quickly when starting a new project, and that this aided their ability to influence and negotiate.

3.10 CONCLUSION

In this chapter, I presented the key findings relating to what the participants as leaders in the outsource context did and the competencies they had acquired to maintain their work identity.
CHAPTER 4: DISCUSSION

4.1 INTRODUCTION

In this chapter, I relate the experiences and perceptions of the participants to what I extracted from the existing literature. First, I provide a leader work-identity profile, describing leadership roles, role uptake, leader motivation, and personality traits, and how these inform leaders’ work identity. Secondly, I focus on the competencies, industry knowledge, business skills, global mind-set, and interpersonal skills the leaders had developed to operate in the multi-faceted environment. Finally, using the above building blocks, I offer a model describing how leaders form and maintain their work identity.

From my preliminary review of the literature on research in the outsource domain, I found a focus on (i) team members and their interaction in terms of sharing knowledge and trust (Nesheim & Hunskaar, 2015), (ii) reasons for outsourcing failure (Hlawu-Chihwenga, 2013), (iii) relationships within the organisation (Mani & Barua, 2015), and the identity and stress of team members within outsource arrangements (Burke, 1991). I could find no literature on the work identity of the leader appointed by the client to manage an outsource project within complex inter-organisational structures.

Before discussing the findings on formation and maintenance of leaders’ work identity, I offer a brief literature overview of the concepts of self-identity and social identity, which, together with job characteristics, are aspects that form work identity (Kirpal, 2004b).

4.2 SELF-IDENTITY

The concept of self includes the core of our being, our total experiences, and our view of ourselves (Van Deventer & Mojapelo-Batka, 2013), which is defined by our values, beliefs, self-awareness, interpersonal qualities, social behaviour, interests, goals, and environment (Alvesson & Willmott, 2002; Sluss & Ashford, 2007), and is influenced by elements of personal development (Alvesson & Willmott, 2002; Gini, 1998). In the present study, self-concept included the leaders’ personal and employment history and how they prioritised events in particular phases of their lives. In everyday life, we alternate between referring to ourselves as an object and a subject. For instance,
when we say, “I will do the planning,” we refer to ourselves as an object doing something. In other instances, we refer to ourselves in terms of the perception we have of self, for example, “I am a reasonable person” (Van Deventer & Mojapelo-Batka, 2013).

Personal identity stresses individual uniqueness, such as biography, behaviour, and mind-set. Social identity is obtained through elements of characteristics given to them by others, with an expectation of him or her behaving as others do in a similar social context (Huber & Krainz, 1987).

4.3 SOCIAL IDENTITY

Social identity implies a person acting according to a role within a social context, with related rewards of recognition and group acceptance when the person acts according to these social expectations. These social response processes act as external guidance, assisting individuals to build an identity that can be shared by others (Kirpal, 2004b).

Social identity research forms part of work identity, and includes individuals’ perception of self whilst interacting with the work group, the role they fulfil, and how and where they places themselves within the organisation (Sluss & Ashford, 2007; Walsh & Gordon, 2008). In addition, individuals’ self-awareness affects their social interaction and their sense of belonging. It also influences how they take up their assigned roles, as well as their ability to change their management style (Ashforth, 2001; Burke, 1991; Davies, 2015; Hodgson, Paton, & Cicmil, 2011; Walsh & Gordon, 2008). In addition to self and social identity, work identity is influenced by a person’s job characteristics.

4.4 JOB CHARACTERISTICS

The literature defines job characteristics as demands or roles the leader is expected to fulfil, which process is influenced by both intrinsic and extrinsic resources (Schaufeli & Bakker, 2004). Bakker and Demerouti (2007) described job demands as “physical, psychological, social, or organizational aspects of the job that require sustained physical and/or psychological [cognitive and emotional] effort or skills and are therefore associated with certain physiological and/or psychological costs” (p. 312), and are further classified as proximal and distal demands. Proximal demands include role ambiguity, conflicting roles, lack of support from superiors and peers, work overload,
and lack of feedback. Distal demands include an unsupportive climate and a difficult work environment (De Braine & Roodt, 2015). Some of these proximal and distal demands were discussed in the findings, and formed part of the participants’ role profile. The findings showed that job demands are part of the leaders’ role profile and central to their work identity, which is discussed in the context of outsourcing31 and in the findings related to the theme Leadership role32.

The second facet of job characteristics is resources. These resources are “physical, psychological, social, or organizational aspects of the job that are either/or functional in achieving work goals, reduce job demands and the associated physiological and psychological costs, stimulate personal growth, learning, and development” (Bakker & Demerouti, 2007, p. 312). These resources are found at various levels, such as organisational, interpersonal, social, work, and task level. At organisational level, the resources are: remuneration, growth opportunities, and job security, while at interpersonal and social levels, resources include supervisor- and peer support and team climate. At the work level, resources include the ability to make decisions and role clarity, while at task level, they refer to aspects of performance feedback, skills variety, and task identity (Bakker & Demerouti, 2007).

4.5 WORK IDENTITY

As indicated in the findings, we spend more time working than any other activity, and even take work home over weekends33. It is then not surprising that work forms a big part of our identity and character. Work allows for self-expression, self-fulfilment, self-realisation, and personal freedom (Burke, 1991; Gini, 1998). Who we are at work requires a constant inner negotiation between personal and social identities (Ibarra & Barbulescu, 2010; Saayman & Crafford, 2011).

Work identity has been defined in the literature as:

- a combination of the individual’s self-concept and social identities, which influences the roles the person accepts and his or her behaviour within a work setting (Walsh & Gordon, 2008); and

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31 Please see Section 1.2
32 Please see Section 3.3
33 “I do work a lot of hours, and I do give a lot to the client in the project, but it's just doing things, the work, whatever you need to from a personal side to balance things out.”
• a “multi-identity, multi-faceted and multi-layered construction of self” (Lloyd, Roodt, & Odendaal, 2011, p. 56). The cited authors named three core aspects: a) life sphere — the concept of self and social identity, b) life role — an identity that allows the individual to interact with work groups, and c) work facets — how the individual constructs work to enrich his or her social belonging.

Kirpal (2004b) described work identity as multi-faceted, and defined three dimensions: (i) structural, (ii) social, and (iii) individual. Structural dimension are concepts of work, patterns of employment, and training, which are rooted in culture and strongly influenced by national context and historical background (Laske, 2001).

The social dimension of work identity is understood as a collective identity developed during interaction with other individuals (superiors, colleagues), groups (teams, business units), and other bodies (trade unions, professional bodies). It includes how career training, communities of practice, and organisation affiliation affect individual work commitment and motivation (Kirpal, 2004b). Lastly, the individual dimension includes the person’s career background, professional development, and his or her perception of and attitude towards work. It relates to the interface between work–life balance, work centrality, and the meaning each person gives to work (Hoff, 1990). It includes which aspects of work are perceived as important and how work dynamics affect the meaning of work and individuals’ work commitment, attitude, motivation, and performance (Kirpal, 2004b).

This above definitions of self-identity, social identity, job characteristics, and work identity provided a background to the discussion of the work-identity profile (Section 4.6) and competencies (Section 4.7) of the leaders in the present study.

4.6 LEADERS’ WORK-IDENTITY PROFILE

Identity helps the individual to adapt to work demands and the environment (Ibarra & Petriglieri, 2010), which have to be taken into consideration in compiling the leader profile. Work identity is thus formed while negotiating the interface between personal resources, values, mental strategies, work context, and work processes. This relationship between individual outlook and the formal organisational culture and processes influences the individual’s concept of work and affiliation to role, work environment, and the organisation (Kirpal, 2004a). The manner in which the leaders in the present study perceived their formal work environment and how well they
interpreted and interacted with the informal working processes influenced their success in working with their peers and other stakeholders. The formation and maintenance of work identity is discussed below, in relation to leadership roles, role uptake, motivation, traits, and personality.

4.6.1 Leadership roles

The first aspect considered in building a leadership profile was the roles the leaders fulfilled in the outsourcing context. The participants reported fulfilling a variety of roles, which were described in Section 3.2. The roles were mapped according to Mintzberg’s (1973) management role theory (see Table 2). As shown in the table below, the activities the participants described for each role often related to more than one of Mintzberg’s managerial roles.

Table 2

*Leadership Role mapped to Mintzberg’s Managerial Roles*

<table>
<thead>
<tr>
<th>Role</th>
<th>Activity Description</th>
<th>Role Mapping</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Interpersonal roles:</strong> Roles centres around influencing outcomes and interacting with stakeholders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Figurehead</td>
<td>Represent organisation in legal, social, and ceremonial activates. Attend outside meetings and sign documents, e.g., attend vendor meetings, sign off on milestone documents</td>
<td>Manage outcomes</td>
</tr>
<tr>
<td>Leader</td>
<td>Perform all managerial actions involving subordinates. Provide coaching/training and give feedback, e.g., focus on outcomes</td>
<td>Manage outcomes</td>
</tr>
<tr>
<td>Liaison</td>
<td>Network and interact with people outside department, e.g., business units, to maintain relationships. Serve on committees and attend forums outside organisation, e.g., steering committee; liaise with vendor forums</td>
<td>Manage outcomes</td>
</tr>
<tr>
<td><strong>Informational roles:</strong> Information-gathering, analysing information, followed by knowledge management and providing information to relevant team members and stakeholders</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Decisional roles:

<table>
<thead>
<tr>
<th>Role</th>
<th>Functions and Responsibilities</th>
<th>Manage Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor</td>
<td>Gather and analyse information to understand opportunities or risks, e.g., progress and challenges in a project</td>
<td>Planning, Administrative work, Governance work</td>
</tr>
<tr>
<td>Disseminator</td>
<td>Interpret information and disseminate to relevant parties, e.g., subordinates or management. Knowledge management.</td>
<td>Planning, Transition work, Administrative work, Governance work</td>
</tr>
<tr>
<td>Spokesperson</td>
<td>Provide information and feedback to people outside organisation, e.g., provide information to vendor teams about performance and planning</td>
<td>Team-building, People management, Transition work, Governance work</td>
</tr>
<tr>
<td>Entrepreneur</td>
<td>Innovate or facilitate new ways to solve technical challenges</td>
<td>Planning, Problem-solving</td>
</tr>
<tr>
<td>Disturbance handler</td>
<td>Take corrective actions when faced with unexpected challenges or a conflict situation, e.g., project implementation delayed due to fatality</td>
<td>Planning, Problem-solving, Governance work</td>
</tr>
<tr>
<td>Resource allocator</td>
<td>Plan, e.g., resources or budget allocations</td>
<td>Planning, Team-building</td>
</tr>
<tr>
<td>Negotiator</td>
<td>Represent organisation during negotiations, e.g., pricing of vendors and resource availability during critical period in a project</td>
<td>Planning</td>
</tr>
</tbody>
</table>

According to Achua and Lussier (2013), leadership stems from managerial skills, which include (i) technical or business skills, which incorporate methods, processes, and tools to perform a tasks; (ii) interpersonal skills or the ability to work with people, communicate, and develop successful relationships; and (iii) decision-making, which is the ability to analyse a situation, choose appropriate solutions to solve problems, and seize opportunities. Therefore, these roles could be further categorised as managerial and leadership roles. Management roles are described according to four functions, namely planning, organising, leading, and controlling (Achua & Lussier, 2013). Jessup (1990) included administration, coach, and advisor as leadership roles.
Referring to the roles discussed in Section 3.2 under the theme Leadership role, the roles are classified and discussed below.

The roles (codes) Manage outcomes, People management, Problem-solving, and Transition work were classified as leadership roles, while Planning, Team-building, Administrative work, and Governance work were categorised as managerial roles.

The key leadership role indicated in the study was Manage outcomes, which included both leader and managerial roles, which were mapped to various roles proposed by Mintzberg. These roles require the ability to maintain project focus and influence others to deliver a shared vision, which is defined as a process of communicating ideas, reaching agreement, and motivating team members (Achua & Lussier, 2013; Galvin, Balkundi, & Waldman, 2010). As reflected in the findings and described in the literature, outcomes are based on direct contact between a leader and followers through face-to-face communication, as all parties get instant feedback, with non-verbal signals such as facial expression and voice intonation providing related information that is not available when other media are used (Daft, 2008; Lengel & Daft, 1988). In the context of outsourcing, face-to-face contact it is not always possible. As described by Bass (1990), a lack of direct contact often creates a void, which impacts the leader’s behaviour and affects trust.

The next import leadership role was People management, which emerged as one of the primary roles in enabling outcomes. It could be argued that it is a managerial role, but the findings showed the role requiring leadership skills in coaching, as well as managerial skills such as resource planning and tracking. As discussed earlier, People management relates the leader’s ability to influence, especially in the outsourcing context. The literature describes the ability to influence as affected by the group’s diversity, as well as the timing of group members joining the project (Pfeffer, 1981). Leaders in the present study indicated that they employed various strategies to influence team members and create a cohesive unit. Taking into account the diverse views of different cultures, the leaders’ strategies included directed communication sessions, sharing biographical information of the team, and creating WhatsApp groups where members shared important information, such as birthdays. Similar to

34 “When you have everybody pulling in the same place, it is very rewarding, and often very successful.”
35 “Although video conferencing is available, better results in influences was reported when people meet face to face.”
36 “We do a bit Q&A by video conferencing.”
the findings in Galvin, Balkundi, and Waldman (2010), some participants also indicated deliberately using surrogates\textsuperscript{37} to influence and serve the interests of the project and stakeholders.

The leadership role \textit{Problem-solving} could be seen as a managerial role that requires managerial skills, but, mapped to decision roles, it requires facilitation and innovation to take corrective action when challenges arise. The role entails risk and impact analysis to provide strategic views to senior management inside the organisation, as well as to external vendors, and not simply providing solutions, as is the case at a managerial level. \textit{Transition work} is another example of a leadership role with various managerial aspects. For instance, the leader will gather and interpret information, which could be seen as a managerial function, but it then requires interpretation and coaching of outside parties in the technical understanding or wider implications of information or solutions.

As mentioned above, managerial roles included team-building. Trust was found to be an integral part of team-building and people management. It is integral to every aspect of leadership, and was therefore included in both managerial and leadership roles. The team-building role required the managerial skills of selecting the correct combination of people and building team viability. The roles \textit{Administrative work} and \textit{Governance work} were considered informational roles involving the gathering of information and knowledge management, and providing feedback to team members and stakeholders. The \textit{Planning} role employed activities listed as part of both informational and decisional roles. The leaders in the present study not only monitored projects, but used reviewed sessions and the solution to issues, to schedule and negotiate the allocation of resources.

As shown in the discussion above and collaborated in the literature, the variety of skills required to fulfil both leadership and managerial roles speaks to the multi-faceted nature of the leaders’ work identities (Kirpal, 2004b; Sluss & Ashford, 2007), which strongly influenced the inter-organisational relationships within projects and, thus, the project outcomes. Similar to what is postulated in the literature (Foreman & Whetten, 2002; Pratt & Foreman, 2000), the variety of roles and dealing with the various organisations and cultures influence how the leaders behave and take up their roles.

\textsuperscript{37}“I needed someone who understood the Singapore in the landscape and who could act as my go-between to get some of the local knowledge around how we work, to help us execute some of those projects.”
The strategies used by these leaders to fulfil the various roles in the complex environment are affected by their work history, professional identity, project management affiliations, project management knowledge (Hodgson, Paton, & Cicmil, 2011), and project management experiences, as well as their ability to influence people within the organisation (Paton, Hodgson, & Cicmil, 2010; Petriglieri & Stein, 2012). Their work identity therefore includes a shared personal and organisational vision.

As stated by Petriglieri and Stein (2012), both the leaders’ conscious and unconscious thinking processes are projected onto team members and vendors, and are shown in the fulfilment of their people management role and their ability to influence aspects such as realistic planning and influencing senior stakeholders in decision-making. The findings of the present study show that, when the leaders struggled to identify with their role or the organisation, it led to demotivation, disengagement, burnout, and an inability to solve problems38 (see Burke, 1991; Hodgson & Paton, 2016). Thus, in order to lead, leaders engage in an ongoing process to resolve the tug between personal and social identities and occupational demands (Kreiner, Hollensbe, & Sheep, 2006), which requires congruence between personal and organisational values, as well as fulfilment of project delivery expectations.

At times, the leaders in the present study had to behave in ways that were not congruent with their values, for instance, leaders having high values regarding quality and then having to accept poor-quality work from a team member. This lack of congruence created a negative feedback loop between the social and personal identity of the leader, which then impacted the leader’s motivation and commitment. In addition the leader’s sense of belonging, expression and work engagement are strongly influenced by leaders’ identification with the various organisational cultures and practices (Ashforth & Mael, 1989; Saayman & Crafford, 2011; Walsh & Gordon, 2008). This was shown in the leaders in the present study carefully selecting organisations and projects with which they were able to associate.

Walsh and Gordon (2008) suggested that leaders use their management and leader responsibilities to live out their multi-faceted work identities by identifying strongly with the role and occupation, which in the present study was the role of project- or programme manager in the outsource context. This was shown in the participants viewing themselves as a brand with strong concepts of reputation, and frequently

38 “‘…what are we doing here?’ The fact that I hate getting out of bed in the morning.”
mentioning, “This is who I am” or “I am good at [this].” They had clarity regarding what their roles entailed and communicated with vendors and team members regarding role expectations and behaviours. In discussions the participants with a clear understanding of their roles and who they were had greater competencies in business, interpersonal skills, and a global mind-set indicated greater ease in dealing with these stakeholders\(^{39}\) and in managing their work identity.

Whilst the wide variety of roles strongly influenced the participants’ work identity, their ability to take up the role should also be considered.

4.6.2 Role uptake
The uptake of the various roles described was influenced by the leaders’ self-awareness, their levels of motivation to take responsibility for completing tasks, and their level of competence (see Petriglieri & Stein, 2012; Saayman & Crafford, 2011). Poor role uptake was reported in instances when management support was lacking or when the PMs did not identify with the organisation or project, resulting in what Li (1994) described as a tolerance of conditions and self-reflection, followed by resignation when conditions do not change. As shown in several studies, job demands could lead to burnout and thoughts of resignation, but, as shown in the results of the present study, this was less likely if the work was interesting and challenging and the leaders felt they were able to deliver (Bakker, Demerouti, & Verbeke, 2004; Schaufeli & Bakker, 2004). The PMs’ work identity was therefore also influenced by their ability to take up roles and congruence between personal and organisational values, which is similar to the congruence described by Kreiner, Ashforth, and Sluss (2006).

The fulfilment of leadership and managerial roles in an outsource context requires complex negotiation of work identity. To extend the discussion of the leaders’ profiles, together with an understanding of the complexity of roles and role uptake, I now discuss what motivated them.

4.6.3 Motivation
In order to discuss motivation, I reviewed literature describing various motivational theories, which included theories on needs fulfilment, cognition, self-regulation, and motivational hygiene, to name a few. Motivation is described as the mental activities that make people take action (Panksepp, 2004), and, as shown in the findings, staying

\(^{39}\)”It’s quite easy if I can focus on the new role and not do 20 different other things.”
motivated at work depends on the personal meaning people attach to work. Motivation at work has been described as having three dimensions, namely work centrality, social norms, and valued work goals (Lundberg & Peterson, 1994; Steers & Porter, 1991). In the present study, the PMs valued a work–life balance and family, and also described having high levels of work centrality and attaching great importance to their jobs. They indicated a willingness to work longer hours for certain periods and manage their work–life balance during this time.

Similar to the description by Sias (2009), these long hours stemmed from their variety of role requirements, high levels of acceptance of personal responsibility, as well as challenges brought about by modern communication technologies with 24-hour access to organisations, resulting in intrusions on family life. In addition, aspects of job security and productivity expectations contributed to employees using family time to complete work, causing the work and family spheres the overlap. Interestingly, whilst long working hours were accepted as par for the course, a work–life balance was a motivational factor, and participants indicated placing a high value on family life. However, the findings did indicate a tipping point, when leaders would disengage from work, with most describing this tipping point as when fatigue sets in, which is when they will start managing a balance aggressivel.

The findings further support the work motivational theories of needs fulfilment, self-regulation, and motivational hygiene. I now describe each of these theories in relation to the findings.

A driving motivator for all the participants was challenging and interesting work. It provided the participants with a feeling of contribution and adding value, which related to their social norms and valued work goals. This supports needs-fulfilment theory, with the findings signalling links between aspects of work motivation and participants’ character, disposition, and values (Sdorow & Rickabaugh, 2002). It also supports Maslow’s (1970) hierarchy of needs theory, with participants describing a high need to

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40 “Why are you in the job? Does the job match what you want? Are you getting what you want out of it?”
41 “Very important. I always said I could change my job a thousand times; I am not willing to change my family. Not, okay.”
42 “Organise something and building stuff. That’s also a bad thing in my character. As soon as it’s built, then I lose interest.”
43 “I never compromise my values.”
be challenged and realise self-actualisation, whilst others cited financial reasons\textsuperscript{44} for staying in an organisation, even if they wanted to leave due to a value incongruence\textsuperscript{45}.

Also considered in terms of motivation was cognitive theory, which describes making conscious choices based on appraisals and expectation of situations, and being motivated by value in the outcomes of their actions. Cognitive theory lists three indicators of behaviour: valence, instrumentality, and expectancy (Vroom, 1964). In the findings, aspects of having clear personal outcomes and wanting to make a difference (valence), having the mandate to lead a team (instrumentality), and the ability to deliver a successful project (expectancy) supported this theory. As part of work motivation, Van Deventer and Jordaan (1998) raised the aspect of equity or people’s perceptions of fairness in remuneration relating to skills, or the cost of their input, as motivation. This was also described in the findings, with the participants using a measure of fatigue or interference in their personal life with respect to perceptions of fairness, with only one participant raising remuneration as a motivator, citing financial reasons above personal values. The majority of the findings described a cognitive match with organisations as an influence in the decision to take on a project.

The leaders’ behaviours in reaching desired outcomes supported self-regulating theory relating to personal goals as motivators to work (Sdorow & Rickabaugh, 2002). Furthermore, their attitude and commitment to the organisation influenced their motivation. Motivational hygiene theory describes the relationship between job satisfaction and work motivation (Herzberg, 1966; Herzberg, Mausner, & Snyder, 1959). According to the theory, both favourable hygiene factors (context of the job) and the presence of motivating factors (content of the job) lead to job satisfaction. The participants described an alignment between their own and organisational values, the mandate to lead teams (hygiene factor), and challenging work (motivational factor) as requirements for job satisfaction. If any one of these were lacking, they would become dissatisfied and resign.

4.6.4 Traits and personality
There was a high number of quotes related to trait and behaviour; almost all the participants ascribed their being in this particular career and their success to certain

\textsuperscript{44} “You will stay because of financial backing.”

\textsuperscript{45} “So, if an organisation wants to compromise my values, I don’t do it. That’s when I would walk away.”
personality traits. Traits are defined as a person’s personal characteristics, evident in habitual behaviour, thought patterns, and emotions, which remain relatively constant over time (Kassin, 2003; Wang, 2010) and are influenced by aspects of personality (Van Deventer & Jordaan, 1998; Van Deventer & Mojapelo-Batka, 2013). This is supported by the findings of the present study, with participants describing consistent personality traits such as taking responsibility, being organised and able to make decisions, to name but a few.

I reviewed numerous traits theories, such as Allport’s (1937) trait theory, which holds that people’s behaviour can be understood or predicted by knowing what they value, the HEXACO Model of Personality Structure (Ashton et al., 2004), and trait activation theory (Tett, Simonet, Walser, & Brown, 2013), and decided on the Five Factor Model of Personality, also called the Big Five Taxonomy, which is underpinned by person-centred theory. The reason for this choice was that the Big Five Taxonomy is the most stable, as it is relevant for various ages, genders, languages, and cultural contexts (Digman, 1990; Weiten, 2001) and predicts work behaviour (Barrick, Murray, & Mount, 1991).

The dimensions of the taxonomy are: Extraversion, Conscientiousness, Agreeableness, Neuroticism, and Openness to new experiences (Achua & Lussier, 2013; Ang, Van Dyne, & Koh, 2006). Several variations on these five traits are offered, and for clarification relating to the findings of the present study, I shortly describe each trait. Extraversion, also called Surgency, includes traits such as dominance and determined energy or drive. Conscientiousness refers to traits such as dependability and integrity, while Agreeableness includes EQ and sociability. Emotional stability, also referred to as Adjustability, incorporates aspects such as self-confidence and self-control, and, lastly, Openness to new experiences includes flexibility, intelligence, and an internal locus of control (Achua & Lussier, 2013; Van Deventer & Mojapelo-Batka, 2013). In the present study, most of the participants displayed an internal locus of control with high levels of acceptance of responsibility. As described by Van Deventer and Jordaan (1998), these leaders also displayed a high sense of self and self-esteem, with the ability to evaluate their success or failures. While they indicated a willingness to learn from mistakes or failure, they also took it very personally. This

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46 “And that, for me, just shows me it wasn’t a career path I picked. I just do what I do, and do it to my best of my ability. And someone spot it and go ‘Yes, we can use that, come here, thank you very much.’”
47 “I have always been an organiser, since I was a kid…”
48 “If you see something needs to be done, you decide, ‘That’s my role, and I will take it up.’”
49 “…just think and learn from it, and not make the same mistake again.”
self-concept is echoed in person-centred theory, which emplaces a person’s subjective viewpoint and describes a person living in harmony with his or her deepest feelings. ‘Fully functioning’ people trust their own intuition and are open to new experiences. Together with a good self-concept, participants also had high levels of flexibility and, as Rogers (1951) described, had the ability to change their perception of their personal identity and even beliefs about their own nature and unique qualities.

All participants described a high need for self-actualisation, with the characteristics of open and spontaneous behaviour, as well as a clear perception of reality (Weiten, 2001). As stated by Landy (1989) and also shown in the findings, self-actualisation includes a sensitivity to the needs of others and good interpersonal relationships. The participants were also very focused on achievement and thrived on challenging tasks. Traits of self-development also came to the fore when they had to acquire new knowledge to fulfil a role or interact with team members.

Interestingly, while the participants understood the need for processes, they expressed a desire to be free from organisational processes and constraints in the workplace, preferring a pragmatic approach of measuring output rather than input. This collaborates the findings of Politis and Politis’ (2011) study, which found a relationship between creating, managing by results, and being open to new experiences. As part of the pragmatic approach, participants described being open in communication with vendors and other stakeholders, and changing their management style when required, which indicated traits of agreeableness, conscientiousness, and openness to new experiences. The participants felt that their communication was clear and precise, and that they were organised and took responsibility for addressing issues quickly. In doing so, some participants reported being well liked by outside parties, so much that vendors requested to work with them again.

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50 “Picking the right person for the job to ensure success. I had to partner with some people, so I chose my partners very carefully, particularly on the integration side.”
51 “I had no skills set in the German language, so I went very quickly to get past the basics. After six months, your learned it.”
52 “It means you do stuff, you create stuff, and you make stuff with other people. And I still love to do that.”
53 “Change the track, of course, change in doing it a different way, use a different method to get to the end result. In other words, it is not linear.”
54 “If I did not like something, I thought it would have a little bit of an issue or a bit of a gap in it, I explained to them what I thought about it.”
Although the participants showed the ability to manage virtual communication through a variety of media, some expressed hesitance in trusting employees located remotely. In these instances, the PMs had sufficient self-awareness of their work preferences, and displayed traits of agreeableness and openness in working with these teams by taking the time to build trust. To establish this trust, they implemented firm measures to ensure correct feedback by clearly expressing their expectations and providing clear direction. Similarly, all the participants showed traits of conscientiousness in being organised and responsible and managing based on performance, which led to higher team trust. They were not averse to providing very direct feedback, and showed a preference for direct communication by having regular meetings, both face-to-face and using technology, but with a definite dislike for e-mail as a communication medium. Similar to the findings of Mount and Barick (1995), the participants who described behaviour relating to higher conscientiousness also mentioned that they lead teams with ease whilst managing ambiguity, and indicated that they easily took up their roles.

Aligned with the findings of Digman's (1990) study, the trait of openness to new experiences proved to be important in gaining cultural intelligence (CQ). This led to effective relations and interactions with team members from diverse cultural backgrounds, who are often found in global inter-organisational teams. This openness to new experiences was linked to all four CQ factors (metacognitive, cognitive, motivational, and behavioural). According to the literature, traits relate to metacognitive CQ, while agreeableness or an easy-going nature relates to behavioural CQ. Lastly, high extraversion relates to high cognitive, motivational, and behavioural CQ (Digman, 1990).

Next the participants described competencies enabling them to take up roles.

### 4.7 LEADERSHIP COMPETENCIES

According to Achua and Lussier (2013), leadership is a process that contains five key elements, namely (i) leader–follower exchange, (ii) influence, (iii) organisational objectives, (iv) change, and (v) people. The (i) leader–follower element is a two-way process of exchange between leaders and followers; (ii) influence is the process

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55 “…prefer short meetings where we talk to people and not always on an e-mail.”

56 “…we didn’t always agree on stuff, but it is totally fine by me. We could have some robust discussion, we didn’t always agree on everything, which is fine, and that’s healthy.”
whereby the leader motivates and communicates ideas; (iii) organisational objectives are achieved when the leader influences followers to act to attain the organisational outcomes; (iv) change is a constant if organisations are to survive in the global economy, and effective leadership realises this need; and, lastly, the element of (v) people refers to the team members required to effect change. In order to implement change and influence, the PMs in the present study had developed certain competencies, as described in literature, through experience and in executing day-to-day activities (Day, 2007; McCauley, Ruderman, Ohlott, & Morrow, 1994). In the present study, the competencies emerged as skills acquired by the PMs to enhance their leadership profile: industry knowledge, business skills, a global mind-set and, interpersonal skills. These align with the skills defined in the ATD Model (Association of Talent Development, 2014).

4.7.1 Industry knowledge

With the intensified focus on corporate responsibility (Onkila & Siltajoja, 2017), project success, together with a positive rate of return (Ramarajan, 2014), it has become imperative that leaders have industry knowledge to successfully lead teams. Milliken and Martins (1996) added that diversity in knowledge, for example, work background and industry knowledge, is relevant to organisational success. For example, industry knowledge informs which behaviours are expected and tolerated in an industry (Javidan, Dorfman, Sully de Luque, & House, 2006).

The importance of being part of an industry and having particular knowledge about the industry was reflected in the findings of participants having accepted the role of coaching vendors in the way the organisation operated, to ensure industry compliance. This coaching enables vendors to become part of an in-group, which is central to social identity — belonging to a social grouping (Lewis, 2011). As described by Tanis and Postmes (2005), the PMs in the present study displayed a strong social identity with respect to industry sectors (mining and financial) and their field of work (outsource project management). They did not easily trust vendors or vendor project managers with no experience in the sector.

The competency of industry knowledge not only enhanced the participants’ social identification, but also influenced personal attributes such as management style and

57 “And be it that you make it known to the guys, you know what safety implications could be… And that they even need to, in terms of their planning, in terms of be it their unique project plans and roles in the programme plan, that there is a focus around safety and safety awareness as well.”
behaviour when fulfilling their roles, and was also instrumental in their acquisition of business skills.

4.7.2 Business skills
The business skills described in the findings were similar to the ten skills defined by McCauley, Ruderman, Ohlott, and Morrow (1994), and related to the business skills defined in the ATD Model (Association of Talent Development, 2014). The business skills identified in the present study included:

(i) dealing with unfamiliar responsibilities, with a leader assuming new roles; 
(ii) developing new directions, with leaders reacting to project changes and maintaining project focus; 
(iii) addressing inherited challenges due to unspecified requirements; 
(iv) coaching inexperienced employees and vendors in organisational processes, including building strong relationships; 
(v) accepting responsibility in managing stakeholders and outcomes; 
(vi) management of the scope, budget, and risks of projects, including the ability to manage ambiguity and think strategically; and 
(vii) interfacing with others by influencing without authority, as shown with team members not reporting directly to the leader; 
(viii) handling external pressure, such as unexpected impacts and delays in project delivery; and 
(ix) managing diversity in leading diverse teams and working across cultures, as shown in working with teams in various regions.

Some of the other business competencies acquired by the PMs were: the ability to keep a focus on outcomes, motivating teams, managing stakeholder expectations, and having sufficient self-awareness to manage their own behaviour. Together with industry knowledge, business skills, and, as discussed in part under leadership traits, the competency of a global mind-set emerged as essential when leading diverse teams.

58 “It’s quite easy if I can focus on the new role and not do 20 different other things.”
59 “A typical day is telling people what you expect from them, and it’s always adjusting things.”
60 “Especially with the dynamic world where, one day, you can have a fatality. It screws your schedule by four weeks even, because the operational site goes into lockdown mode.”
61 “Ability to manage self and team when clear scope and outcomes are not defined. The leader has to manage team expectations, problem-solve on the go, and interpersonal dynamics, as some people work better when outcomes are defined.”
4.7.3 Global mind-set

To gain a competitive advantage, it is imperative that organisations and management integrate across the globe. The nature of outsourcing demands a global mind-set, as leaders are required to influence and mobilise teams and stakeholders in different locations and from different cultures and organisational backgrounds (Dinh et al., 2014; Irving, 2009; Javidan & Bowen, 2013; Javidan & Walker, 2012; Milliken & Martins, 1996). Globalisation requires a unique set of leadership skills, and a global mind-set, which is defined as referred to as a set of characteristics that enable a leader to influence individuals, groups, and organisations that are different from them to achieve the desired outcomes (Irving, 2009). These leaders are referred to as global leaders, and are proficient at functioning in multi-cultural contexts. In addition to a global mind-set, these leaders require cultural intelligence and the ability to function in different environments (Ang et al., 2006; Rabotin, 2008). Cross-cultural interactions have cognitive, motivational, and behavioural requirements related to emotional and social intelligence, as well as increased self-awareness (Crowne, 2013; Earley & Ang, 2003).

A global mind-set takes into account the diversity of people at a corporate level, as well as the individual level. Diversity relates to observable attributes such as race, gender, and age, as well as attributes such as personality characteristics and values of group members. Also relevant is the diversity of knowledge or skills with reference to, for example, team members’ education, range of industry experience, and functional background. This diversity could lead to major differences in preferences regarding interaction, focus, or even in the approach to solving problems (Milliken & Martins, 1996).

The literature offers several models to measure and assist in the development a global mind-set competency, which includes CQ. To interpret the findings, I used the ATD Model (Association of Talent Development, 2014), and the Global Mind-set Inventory (GMI) (Javidan & Walker, 2012) to define and profile the participants’ global mind-set. I then reviewed the Four-factor Intelligence Scale (CQS) (Van Dyne & Ang, 2004), which measures leaders’ CQ, as well as the Developmental Model of Intercultural Sensitivity (DMIS) (Bennett, 1986, 1993), which is used to measure the development of a global mind-set and CQ. Lastly, I reviewed studies by Hofstede (1980, 1997) and the Global Leadership and Organizational Behaviour Effectiveness (GLOBE) study (House & Javidan, 2004), which describe the dimensions of a global mind-set and how employees from different cultures might view leadership. To provide context, the models are briefly described before turning to correlation in the findings.
Firstly, the ATD Model defines a global mind-set as showing the following traits: accommodation of cultural differences, conveying respect for different perspectives, expanding own awareness, adapting behaviour to accommodate others, championing diversity, and leveraging diverse contributions (Association of Talent Development, 2014). The GMI model determines and measures leaders’ global mind-set profile. As shown in Figure 11, below, this profile comprises three types of capital: Intellectual capital, Psychological capital, and Social capital.

![Structure of Global Mind-set](image)

*Figure 11. Structure of Global Mind-set (Javidan & Walker, 2012, p. 38)*

The first pillar, *Intellectual Capital*, is the leader’s knowledge of global surroundings and ability to recognise and leverage this complexity. It includes the building blocks *Global business savvy* (knowledge of business conduct in different countries), *Cognitive complexity* (the ability to interpret information contained in global business savvy), and *Cosmopolitan outlook* (an understanding that things are done differently in other parts of the world).

The second pillar, *Psychological Capital*, refers to the manager’s disposition in working with other cultures and leveraging their intellectual capital. It comprises *Passion for diversity* (an appreciation of and interest in diversity), *Quest for adventure* (a willingness to deal with risks and new experiences), and *Self-assurance* (energy and resilience to engage in global roles). The last pillar, *Social Capital*, relates to
behavioural aspects such as the ability to alter behaviour to build relationships. It consists of the building blocks *Intercultural empathy* (the ability to connect and collaborate with other cultures), *Interpersonal impact* (the ability to build networks and influence across borders), and *Diplomacy* (the ability to understand and make positive impressions on people in other geographical regions) (Javidan & Bowen, 2013; Javidan & Walker, 2012). Next, I turned to the measurement of CQ.

Aspects of CQ were introduced in Section 4.6.4, which described the relationship between the trait *Openness to new experiences* and CQ. The Four-factor Intelligence Scale (CQS) of Van Dyne and Ang (2004) measures CQ, and is used to determine why certain individuals are more successful in dealing with cultural diversity (Van Dyne & Ang, 2004). The scale’s dimensions are: *Strategy* (processes used to understand diverse cultures), *Knowledge* (individual understanding of similarities and differences between cultures), *Motivation* (willingness to learn about a foreign culture), and *Behaviour* (individual’s adaptation of language and behaviour). In the present study (see Section 3.7: *Global mind-set*), the leaders indicated their understanding of cultural differences and how they altered their management style. They also described a willingness to learn about people and cultures. They all highlighted the importance of leaders recognising diversity, developing their global mind-set competency, and adapting their behaviour.

In the interviews, the participants described their journey in building their global mind-set competency. In the literature, the Developmental Model of Intercultural Sensitivity (DMIS) (Bennett, 1986, 1993) provides a continuum for understanding an individual’s development and orientation towards cultural diversity. As shown in Figure 12, below, the model consist of three ethnocentrism orientations (*Denial, Defence/Reversal, and Minimization*) and three ethnorelativism orientations (*Acceptance, Adaptation, and Integration*) (Bennett, 1986, 1993), showing an individual’s development in worldview, shifting from an ethnocentric to a ethnorelativism orientation (Hammer, Bennett, & Wiseman, 2003). Several participants described how they, over the years, started to adapt, and eventually thought in an integrated manner, for example considering

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62 “Singapore. It was working for a Western company in an Eastern culture, so, therefore, you had a lot of process-orientated people underneath you, but who did not quite think outside the box.”

63 “[Learning about] people, the different cultures, the different types of personalities, and, I would say, business communication.”

64 “Important for any leader, particularly in IT nowadays, is to understand where it may have come from and what it is changing to, and what they need to do to enact that.”
cultural differences, when working with diverse teams.

In addition to developing a global mind-set and cultural intelligence, leaders have to understand that culture and practices of a country shape how people behave and view organisations and leadership. In his studies, Hofstede (1980, 1997) described four cultural dimensions namely (a) Power distance, (b) Individualism–Collectivism, (c) Uncertainty avoidance, and (d) Masculinity–Femininity, with the fifth dimension, (e) Long-term orientation, added at a later stage. The GLOBE study, which build on Hofstede’s studies, evaluated processes within an organisation (modal practices) and how the culture prescribed how these should be done (modal values) (House & Javidan, 2004). The GLOBE project then developed nine cultural dimensions (a) Performance orientation, (b) Future orientation, (c) Assertiveness, (d) Power distance, (e) Humane orientation, (f) Institutional collectivism, (g) In-group collectivism, (h) Uncertainty avoidance, and (i) Gender egalitarianism (House, Javidan, Hanges, & Dorfman, 2002). The GLOBE project also described six leadership cultural dimensions based on leadership theories. These are (a) Charismatic/Value-based, (b) Team-oriented, (c) Participative, (d) Humane-oriented, (e) Autonomous, and (f) Self-protective (Javidan et al., 2006).

In examining the relationship between cultural and leadership dimensions, substantial evidence indicates that leader behaviour, attributes, and influence vary significantly, due to the influence of unique cultural dimensions in diverse contexts (House, Wright, & Aditya, 1997). The findings of the present study collaborate the theory with reference to how the participants incorporated a global mind-set, CQ, and aspects defined in the GLOBE study into their work identity. As described in the literature, the participants showed the ability to deal with complex cognitive scenarios (Jokinen, 2004) in the roles they had to fulfil, and applied mental flexibility and an extensive knowledge base and business skills to solve complex problems (Javidan & Bowen, 2013; Osland & Bird, 2006). Leaders with high levels of these attributes have more success in influencing

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65 *“I couldn’t have done that with them not having worked with them and learnt how they operate in the background and try to match into us.”*
diverse teams, whilst those with lower levels find their roles stressful and frustrating (Javidan & Bowen, 2013).

Aligned with existing literature (Milliken & Martins, 1996), the findings also indicate that inter-organisational groups differ in terms of skills and background, and sometimes have difficulty integrating, which could negatively impact individual work satisfaction, the group’s social integration (Ancona & Caldwell, 1992; O'Reilly, Caldwell, & Barnett, 1989), and, ultimately, work identity. As explained by Bhawuk and Brislin (1992), “to be effective in another culture, people must be interested in other cultures, be sensitive enough to notice cultural differences, and then also be willing to modify their behaviour as an indication of respect for the people of other cultures” (p. 416). It therefore falls to leaders to build relationships and social integration through recognition of diversity and the ability to adapt communication and create an environment of inclusivity (Stone & Patterson, 2006). This was highlighted in the explanation of the code Complex team structures, with participants understanding the vendor milieu and making allowance for organisational and national cultural differences whilst using a variety of communication technologies.

The descriptions of the codes Thinking diversity, Cultural work differences, and Other processes were related to Milliken and Martins’ (1996) study, which highlighted the necessity to recognise the underlying differences in processes and conscious and subconscious preconceptions and beliefs that could influence thinking within the group, and to display and intercultural competence with the ability to think and act in appropriate ways, and to change one’s leadership style (Hammer et al., 2003; Tuleja, 2014). As an example, participants had to understand how team members behaved within a team setting, as opposed to an organisational setting, and adapt their behaviour accordingly.

This ability to influence individuals and organisations from another geographical region aligns with previous research, with the findings indicating that the participants

66 “It’s difficult for someone who has not changed that much.”
67 “…in fact, the team here, we didn’t always agree on stuff, but it is totally fine by me. We could have some robust discussion, we didn’t always agree on everything, which is fine, and that’s healthy.”
68 “…in an Eastern culture, so, therefore, you had a lot of process-orientated people underneath you, but who did not quite think outside the box. So, it was very easy to give them task-based activities, and you could set the direction and the action.”
69 “…Japanese women working for us, and they were complete subjugated, even below us, which was very confronting for us in how … as we dealt with them as equals and peers.”
developed their global mind-set by living in several countries; most of them spoke more than one language. They also displayed a willingness to expand their abilities outside their normal, expected roles, and worked at various levels in organisations to build their global business savvy and cognitive mental ability. The findings described in Section 3.7 regarding a global mind-set not only relate to all the pillars in the Global Mind-set Model (Javidan & Walker, 2012), but also to strategy, knowledge, motivation, and behaviour in the Four Factor Scale (Van Dyne & Ang, 2004) and aspects of personal development indicated in the DMIS (Bennett, 1986, 1993).

The participants’ intercultural sensitivity enhanced their intercultural competence in making allowances when leading the teams, and they had the ability to recognise what they were able to deliver, thereby maintaining their own work identity. The participants interviewed were older, with an average age of 46.2 years, and, as expected, they described extensive industry knowledge, business savvy, and displayed sufficient self-assurance. This was coupled with a range of perspectives on managing cognitive complexity and innovation (see Ancona & Caldwell, 1992; Javidan & Bowen, 2013; Javidan & Walker, 2012). My findings also indicate that PMs who displayed more developed global mind-set exhibited a greater tolerance for and openness to new experiences with respect to different cultures.

As shown in the present study, the divide between intra-personal and interpersonal is not clear, and participants reported using reflection and relationship-building in developing a global mind-set (Irving, 2009) and interpersonal skills as part of their work identity.

4.7.4 Interpersonal skills
The interpersonal skills competency is key to maintaining a work identity, and includes aspects such as the ability to build trust, communicate effectively, network, influence stakeholders, and demonstrate EQ (Association of Talent Development, 2014). Whilst building interpersonal skills, it must be considered that identities evolve, influencing

70 “Effectively, I basically wanted to test myself in terms of not being in just one jurisdiction, Australia, but going to another.”
71 “…the cultures were slightly different, so you clearly had to learn language very quickly.”
72 “…the vendor is in Greece. So, now, with the Easter weekend, Easter is very big in Greece, because they are Catholic, so, from the Thursday to Tuesday, it was more than just an Easter weekend. People are just not available.”
73 “Every project which you do is completely different from the previous one that you’ve done, so your general knowledge in business, insurance, banking, or whatever industry you are in, grows a lot with you in every project. You just have to.”
74 “I think it boils back to respect for everybody.”
how leaders behave over time, and it is therefore important that leaders take note of how they are perceived by those around them, and learn to manage these perceptions (Chin & Trimble, 2015). As shown in the present study\textsuperscript{75} and literature, this management of self-image requires a level of EQ, with a particular focus on self-perception, including the elements of self-awareness, self-regard, self-actualisation, and emotional expression, and is crucial for the development of effective leaders (Stein & Book, 2006; Wasylyshyn, Shorey, & Chaffin, 2012). It is about knowing ourselves, having self-respect and self-esteem, with an awareness of our values and beliefs, whilst striking a balance in the activities we pursue, which was described in leaders being not willing to compromise their values. Also discussed under leadership traits in Section 4.6.4 was the participants striving to become better and reach their full potential (see Cashman, 1998; Stein & Book, 2006).

The findings show that the participants developed interpersonal skills to influence leader–member exchange (LMX) by motivating others to reach project outcomes\textsuperscript{76} (King, Altman, & Lee, 2011). LMX refers to how leaders and followers relate to one another, the quality of their exchange, the allocation of resources, and how power or status is determined (Achua & Lussier, 2013; Chin & Trimble, 2015). In the present study, LMX was demonstrated through some leaders deciding to maintain this exchange through strong but strictly-business relationships, while others included friendships\textsuperscript{77}. In addition, it was contained in the description of how the leaders defined, built, and maintained trust, which strongly influenced their interpersonal competency, with some trusting\textsuperscript{78} more readily than others. At an organisational or structural level, some preferred to select team members they had worked with and trusted\textsuperscript{79}. The participants’ interpersonal competency aided in building relationships quickly, in order to influence and establish power\textsuperscript{80}.

A foundation of building relationships is the development of EQ, which is defined as the link between feelings, character, and moral values, and expressing emotions wisely and appropriately (Van Deventer & Mojapelo-Batka, 2013). The literature describes how our emotions influence how we act and the decisions and judgments

\textsuperscript{75} “It’s perception management, it’s expectation management.”
\textsuperscript{76} “You always need other people, otherwise they are not projects. You always need help. You always need a team.”
\textsuperscript{77} “Most of the time, they are friendships too, but they can be very strong bridges of business relationships.”
\textsuperscript{78} “…would not put the trust at risk. The relationship would be stressed.”
\textsuperscript{79} “So, I chose my partners very carefully.”
\textsuperscript{80} “…build a very, very close relationship with senior management, very early.”
we make, how we perceive and interpret what happens around us, the relationships we choose to have, and our behaviour (Goleman, 2006; Neale, Spencer-Arnell, & Wilson, 2009). Goleman (2006) described it as the ability to recognise our feelings, those of others, and using this to perform and develop relationships with self and others. In the present study, the participants often referred to emotions such as irritation and demotivation when team members did not perform satisfactorily.  

EQ includes self-awareness, empathy, and self-control, with the ability to listen and co-operate with others to find solutions and resolve conflict. Stein and Book (2006) stated that good relationships and coping strategies are some of the key ingredients of success, and that EQ makes it easier to be productive in life. Their EQ-i Model (see Appendix 4) measures Self-perception, Self-expression, Interpersonal relationships, Decision-making, and Stress management. The interpersonal relationship realm, which is of interest in developing the competency interpersonal skills, includes three awareness of social environment, interpersonal skills enhancement with respect to verbal and non-verbal communication, and the ability to talk in front of people. It also includes empathy and social responsibility. These aspects are all described in the findings for the codes Interpersonal relationships, Stakeholder engagement, and Communication style, which was enhanced by the leaders’ other competencies of industry knowledge, business experience, and a global mind-set.

The interpersonal skills leaders develop relate to authentic leadership with a focus on self-awareness and self-regulation and the ability to shape and manage their image (Achua & Lussier, 2013; Chin & Trimble, 2015; Van Zyl, 2014), which was described by all the participants and also formed the basis of some of their behavioural strategies. Aligned with the findings of Chin and Trimble (2015), the findings of the present study indicated a change in paradigm from leadership traits to leadership identity, with participants describing the requirement of congruence between personal, social (team), and structural (organisational) values and outcomes. The roles these leaders fulfilled were very much who they were, and their interpersonal skills competency was crucial to fulfilling these roles. For example, making decisions was considered a key role, requiring interpersonal skills to gather information and then execute by influencing and managing team members.

81 “Instead of, ‘Be calm about it and just tell him again and again….’ I get more impatient.”
82 “Anything that has got reputational damage.”
The discussion synthesis provides a model of the aspects comprising the work identity of leaders in the context of outsourcing.

4.8 SYNTHESIS

This chapter provided a discussion of the findings relating to the literature, and answered the research questions posed in Chapter 1:

- How do leaders perceive themselves in their work environment?
- How do leaders take up their role in an inter-organisation project environment?
- How do leaders view their work identity when dealing and negotiating with various organisational cultures?

To answer the above questions, the data, together with existing literature, were used to create the Leader Work Identity Profile and Competency Model for an outsourcing environment. The model, shown in Figure 13, below, is set in a specific work context, which is the IT outsourcing context within an organisation, and describes aspects of leaders’ work identity. The top section of the model is Leaders’ work identity profile, with leaders’ Competencies at the bottom and EQ to the left. The feedback arrows in the middle of the model link and create circular feedback loops between the Leaders’ work identity profile and Competencies, with the various components enhancing one another.
Figure 13. Leader Work Identity Profile and Competencies Model

The Leaders’ work identity profile focuses on how leaders interpret their work environment and take up a role in an inter-organisational project environment, as well as how they form and maintain their work- and professional identities. The Leaders’ work identity profile is comprised of the components i) Roles, ii) Motivation, and iii) Leadership traits. Roles refers to the complexity of the roles leaders fulfil, the strategies they employ in fulfilling these multi-faceted roles, and how these roles influence their work identity. The data indicated that the leaders’ work identity was linked to the roles they fulfilled, which required a variety of cognitive abilities and flexible behaviour, which was enhanced by maturity, business experience, and industry knowledge competencies.

Their role uptake was further influenced by the second component, Motivation, with the main motivators being challenging and interesting work. The motivational components were clearly part of the participants’ work identity, and, although family and a work–life balance were important, they identified themselves firstly as innovators or problem-solvers. This was also the main reason why they chose to constantly engage with complex and ambiguous environments. The third component, Leadership traits includes personal aspects and behaviour leaders use to interpret and interact with their work environment and take up their roles. The traits most frequently displayed were conscientiousness with high levels of taking ownership and
responsibility, together with agreeableness and being flexible when dealing with teams. This was closely followed by the trait of openness to new experiences, which was also found to be a motivator. This trait formed part of the global mind-set competency, which included a willingness to learn and embrace diversity.

The bottom of the model lists competencies taken from the ADT Model (Association of Talent Development, 2014), which the participants had developed to enhance and maintain their work identity. These competencies were: Industry knowledge, Business skills, Global mind-set, and Interpersonal skills.

Industry knowledge enhanced the leaders' social identity, creating a sense of belonging and shaping acceptable behaviour within the industry context. It formed an integral part of their work identity, with leaders citing specific industry knowledge such as health-and-safety requirements, and strongly identifying with a specific industry.

Business skills enhanced the leaders’ ability to analyse business needs, remain focused on outcomes, and drive results. The business skills competency, together with personal traits such as self-assurance, allowed for innovation and strategic thinking.

The global mind-set was found to be very pertinent in the context of outsourcing. It refers to a leader displaying intellectual, psychological, and social capital whilst engaging with various organisational and national cultures. As part of work-identity maintenance, the leaders constantly worked on developing CQ, together with integration to allow for inclusivity of all team members. In doing so, they built on their own social identity.

As indicated in the findings, the success of the leaders hinged on their interpersonal skills, which were required for effective stakeholder engagement. The participants described the need for self-regulation when adapting their management style to form and maintain interpersonal relationships. Whilst the circular arrows show that the Competencies and Leaders’ work identity profile build on one another to enhance work identity, it is also possible that the various competencies build on one another; for instance, greater competence in global mind-set may influence Interpersonal skills.

Leaders’ work identity profile and Competencies are underpinned by EQ (see Appendix 4), which describes the process of working at intra-personal and
interpersonal levels. To fulfil diverse roles required a constant renewal process, management of self, and updating behavioural patterns by the leaders in the present study. EQ relates to how they viewed their work identity and negotiated the complex inter-organisational environment.

4.9 CONCLUSION

In this chapter, I discussed the study’s findings by relating these to theoretical concepts and research findings found in the literature. The next chapter provides a discussion of the implications and limitations of the study, as well as recommendations for future research.
CHAPTER 5: CONCLUSION, IMPLICATIONS, AND RECOMMENDATIONS

5.1 INTRODUCTION

In this chapter, I firstly present a précis of the dissertation; secondly, I offer the study’s conclusions; thirdly, I discuss its contributions; fourthly, I provide an assessment of the research; fifthly, I point out shortcomings of the study, and, finally, I make some recommendations.

5.2 OVERVIEW OF THE STUDY

In Chapter 1, I introduced outsourcing concepts, as well as how organisations realise outsource agreements and compose teams to deliver on these agreements. I considered literature on the complexity of outsource agreements and delivery of these agreements. This was followed by a description for the roles leaders fulfil within these outsource environments. I observed a variance in the success PMs have in leading outsource projects. This led to the research problem, namely how leading outsource projects might affect leaders’ work identities and perception of their roles. I concluded the chapter by indicating the study’s anticipated practical and theoretical contributions.

Chapter 2 outlined the methodological approach. First, I outlined my interpretive paradigm. I then described my use of existing literature, the linking of theory and research, and managing research ethics. I consulted the literature whilst compiling the research proposal, with subsequent reviews when I derived themes from participants’ accounts. I then continued by using abductive reasoning to link theory and research and to formulate my findings. In addition, I explained how I dealt with research ethics during the study.

Second, I presented the grounded theory strategy used to explore the experiences of the participants. Third, I described the research setting and demographics of the research participants, followed by an outline of my research role. I further described the data collection and interview processes, as well as participants’ observations during these interviews, and my use of memos and a research journal as part of the audit trail to ensure quality research. I also indicated how data were captured, transcribed, and stored. Thereafter, I outlined how I analysed and managed the data using grounded theory.
Chapter 3 provided the research findings. I offered themes and codes derived from the participants’ interviews, describing their experiences. For each of the themes, I presented a network diagram, for which I had using axial coding to identify relationships between codes within the themes. I then described each of the themes and related codes using the most prominent quotes to substantiate my descriptions. The interdependencies and duplication of codes in themes highlighted the complexity and multiple layers of work identity.

In Chapter 4, I first provided a brief literature overview on the concepts of personal, social, and work identities. I then related the participants’ experiences and perceptions to what I had extracted from the literature, and provided a discussion. First, I provided a discussion of the leader work identity profile, comprising leadership roles, role uptake, leader motivation, and personality traits, as well as how these informed their work identity. Second, I focused on the underlying competencies, such as industry knowledge, business skills, global mind-set, and interpersonal skills, which had been developed by the leaders to fulfil their roles. Finally, in the synthesis, I offered a model of leaders’ work identity and answered the research questions.

5.3 CONCLUSIONS

The purpose of the study was to explore the work identity of leaders working in complex inter-organisational structures through outsourcing arrangements.

One research question was formulated:

- What is the work identity of project managers in inter-organisations outsourced projects?

The study provided insights into the multiple roles leaders have to fulfil in the context of outsourcing, which included the strategies they used to take up the roles and deal with role-uptake interferences. The findings led to insights into a leader's profile, including personal motivators and leadership traits. The key motivators were found to be: a need for work–life balance and challenging work, with the latter linked to leadership traits such as high need for self-actualisation and openness to new experiences. The study also indicated that these leaders often came to their positions due to personality traits such as good interpersonal skills being recognised by management or the organisation. When presented with these opportunities, they had the self-confidence to use the opportunities, even though they might not have had the
necessary skills at the time. Additional insight into the multi-faceted work identity of the leaders included identity at a personal, social, and structural level, and how participants used their roles to live out these identities.

The study offered insight into the competencies required of leaders to fulfil their roles at a structural or organisational level. The leaders in the present study had acquired these during their working careers, to enhance and maintain their work identities. They developed these competencies mostly through self-education, experience, and informal learning. Their social identity was built using industry knowledge, business skills, and interpersonal skills. At the personal identity level, the study found that the leaders would sever social bonds with organisations or team members if there were consistent incongruence in values or trust is compromised. This speaks to the high level of integrity and responsibility of the participants. Finally, the study showed the underpinning of EQ in maintaining a healthy work identity, especially in leader self-awareness, stress management, and building healthy relationships.

5.4 CONTRIBUTIONS OF THE STUDY

5.4.1 Theoretical contribution
The study made a contribution by supporting existing literature on theory of work identity and outsourcing. It provided additional insight into the formation of work identity at a personal, social, and structural level in the context of IT outsourcing. The study provided a leader profile explaining the variety of roles and strategies used to fulfil these roles. The profile extended to what motivates these leaders and the leadership traits they display. In addition, it was found that work identity is maintained by gaining and continuously enhancing various competencies, which, in turn, enhance leaders’ profile and ability to fulfil their roles.

5.4.2 Practical contribution
A practical contribution to business is the model presented in Figure 13: The Leader Work Identity Profile and Competencies Model, which can be used by organisations in selecting candidates to lead outsource projects. The key is to select individuals who display great flexibility and high levels of EQ, especially relating to interpersonal skills. Depending on the nature of the outsource contract, the team composition, and location, candidates with a high CQ and a global mind-set should also be considered during the selection process. In addition, consideration should be given to those with
personality traits such as high agreeableness, openness to new experiences, and conscientiousness, and, depending on the size and technical complexity of the project, low neuroticism.

5.5 ASSESSING THE STUDY

Validity in qualitative research is a contentious issue. As Tracy (2010) pointed out, there are presently no generally agreed-upon criteria for quality research. Regardless of scholarly debate, it has become practice that qualitative researchers offer a self-assessment of their study’s quality. Lincoln and Guba's (1985) four criteria for case studies, namely trustworthiness, credibility, dependability, and transferability were adhered to in the present study.

Trustworthiness, Credibility, Dependability and Transferability

5.5.1 Trustworthiness
Trustworthiness relates to the confirmability, credibility and transferability of the findings, and how the researcher proves the quality of the data (Lincoln & Guba, 1985). In this regard, I interviewed participants again after transcribing the interviews. In each instance, I asked more specific questions to clarify my understanding. To test transferability, I also enquired about observations I had noted in the data, during the second interviews. To ensure anonymity of the participants, I referred only to observations, without identifying the other participants.

My own experience in the field under study was addressed in Section 2.7.2, where I described my relationships with the research participants. I indicated how my knowledge and experience assisted me in understanding what they shared with me. However, as I indicated, my personal views also impacted the study’s findings. I tried to demarcate these as far as possible in self-reflections contained in the research journal, which serves as an audit trail.

5.5.2 Credibility
Silverman (2006) defined credibility as using an appropriate research method to connect the study to existing scholarly work. He further emphasised participant selection criteria, type of questions, and systematic data collection, record keeping, and distinction between analysis and interpretation as criteria to ensure credibility. Charmaz (2014) emphasised that credibility is defined by the quality and quantity of
the gathered data. Finally, credibility is established when the researcher acknowledges his or her own interpretation and subjectivism, and performs triangulating of data from different sources (Patton, 2002; Silverman, 2006).

The above criteria were closely adhered to in the present study. As suggested by Golafshani (2003), triangulation was applied by interviewing participants from different organisations, with varying work experiences and backgrounds. In addition, collected data were validated with the participants, to ensure thorough understanding. I performed constant comparing of the data to verify differences and similarities.

5.5.3 Dependability
As Bryman (2004, p. 273), amongst others, pointed out, dependability refers to whether the research can be replicated and the findings are not accidental (Silverman, 2006). To achieve dependability, I used the same set of questions for all the interviews and ensured that all the participants understood them. During initial discussions, all the participants indicated their willingness to be interviewed (Bickman & Rog, 2009). All the participants were given the assurance of anonymity, and could withdraw from the study at any stage. The interviews were transcribed verbatim and reviewed. The interviews were coded, and the findings were evaluated against the data and literature.

5.5.4 Transferability
Transferability refers to the applicability of a study’s findings to other contexts (Eriksson & Kovalainen, 2008). As suggested by Schurink (2009), a general understanding of working context should be obtained by including a variety of participants operating in a different context. As discussed in Section 2.7.1, transferability was enhanced by selecting participants with a variety of demographics and work experiences in different industries. The initial pool of participants worked in the resources and mining sector, and to test transferability of their experiences, I included two participants from the financial sector. To further enhance transferability, participants with different backgrounds and work experiences were included in the study.

5.7 NOTICEABLE LIMITATIONS

While qualitative studies are often criticised as offering findings that cannot be generalised (Mouton, 2001) this is not regarded a limitation in this study. As Tracy (2013, pp. 229-231) points out, qualitative researchers generally agree that “contextualized knowledge cannot be generalised to other research settings.” Following Bloomberg and Volpe (2008, p. 78), I believe that, in a case study such as
this one, the focus should rather be on “how well the study has made it possible for the reader to decide whether similar processes will be at work in their own settings and communities by understanding in depth how they occur at the research site.”

The study included participants with work experience in various industry sectors and geographical regions, as well as from various nationalities and educational backgrounds, which provided different world views. A limitation was that because of the time allocated to a master study, time for data collection and analysis was limited. The study was further limited by the low number of female participants. This was mainly due to the nature of the industry sectors and IT environment, which are still very male-dominated. In addition, the average age of the participants was 46.2 years; no younger participants with outsource knowledge could be identified within the organisations at the time of the study. This could have skewed the findings, as the participants had in-depth business knowledge of outsourcing and project management, and their age may have influenced their world view, providing a certain perspective of work identity formation. Younger participants with less business knowledge and project management experience might offer a different perspective on their work identity formation.

It is difficult for a qualitative researcher not to include his or her personal involvement and interpretation in interview responses, which creates the potential for research bias (Chenail, 2011; Saunders et al., 2009). Although I attempted to remain impartial, my own experiences played a role when I asked clarification questions and interpreted the participants’ perceptions. Although this often provided a catalyst for deeper conversation, my probing during the interviews may have influenced the way in which the participants responded.

5.7 RECOMMENDATIONS

Future research could include generational differences regarding leaders’ work identity formation and leadership roles, in particular with a view to assist organisations in succession planning and ensuring that candidates gain experience in an outsourcing context.

It is also recommended that further studies focus on female perceptions of work identity in the male-dominated sectors related to outsourcing, to enhance diversity in the workplace.
Finally, as described in the Leader Work Identity Profile and Competency Model in Section 4.8, it is recommended that organisations consider leadership profile, underlying competencies, and EQ when selecting candidates to lead outsource projects or programmes. This could assist organisations in the skills development of employees who lack some competencies. In the instance of organisations operating in the global context, a global mind-set and strong interpersonal skills are strongly recommended when appointing an outsource project manager.

5.8 FINAL NOTE

Exploring, describing, and obtaining insight into the experiences of ten leaders working as project- or programme managers in an outsourcing context was a journey, and led to self-reflection on my own work identity and development as a leader. It was interesting and thought-provoking to discuss the various strategies used by the leaders to negotiate roles and manage obstacles, including their reasons for selecting specific strategies. Their lived experiences were, at times, very similar to my own, and the strategies they employed not only highlighted similarities in my own thinking, but also provided new ideas on how I could better approach situations. Experiences described by younger or less experienced participants validated the experiences I had had, and presented ideas on coaching and facilitating future leaders during succession planning. Those leaders with more experience, especially in different industries, provided ideas and insights into a variety of approaches to similar issues. Ultimately, the technical aspects of the required roles are relatively easy, with the challenge and growth remaining human interaction and self-growth.
REFERENCES


Merriam, S. B. (2009). *Qualitative research: A guide to design and implementation* (3rd


Schurink, W. J., Fouche, C. B., & De Vos, A. S. (2011). Qualitative data analysis and


INFORMED CONSENT AGREEMENT

This agreement serves to confirm that the research participant mentioned below gives his/her consent to participate in the Master of Philosophy study titled: “A qualitative study of leader’s work identity in outsourced projects.” The research participant agrees to provide the researcher with his/her experiences and views to the best of his/her ability.

The undersigned participant understands the purpose and nature of this study and understands that her/his participation is voluntary and that s/he may withdraw from the study at any time. The participant further grants permission for the data collected to be used in fulfilment of the requirements for the Master’s degree.

The data collected will be used for research purposes only. The researcher undertakes neither to disclose the identity of any of the participants, nor the origin of any of the statements made by any of them. However, the undersigned participant understands that the nature and principles of this study’s research methodology apply. This means that the researcher is expected to make use of verbatim statements from the transcribed taped interviews and/or excerpts from solicited essays in order to illustrate the everyday experiences of the research participants and their views in the research report.

The participant undertakes to give a true representation of her/his experiences and views.
I, …………………………….the undersigned participant, agree to meet at mutually agreeable times and duration(s) or to other means of communication, e.g., by e-mail or telephone, as reasonably necessary to enable the researcher to complete the study. I further acknowledge that I have received a copy of this agreement and that I may contact any one of the under mentioned if I have any subsequent queries.

**Signature of research participant:** ______________

Participant

**Masters Researcher:**

_______________

Liesel Lategan

Liesel987@gmail.com

+27 83 460 9383

Date: ______________ Place: ______________________

**Research supervisor:**

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Tel: +27 (0) 11 5592078

Cell: +27 (0) 84 9868721

E-mail: roslynd@uj.ac.za
APPENDIX 2

INTERVIEW QUESTIONS

Interviews to explore the work identity of leaders in an outsource environment

Explanation of the study

The study is about the work identity (how they experience themselves; the role and the organisation) of leaders in an outsourced project. To begin I have to state that there are no right or wrong answers and you can decide to withdraw from the study at any time. You will remain anonymous and the recordings and transcriptions will be kept safe and not shared with anyone within the company or other teams.

I want to know how you, as a leader, view yourself and your role as a project manager within outsourcing projects.

Semi-structured Interview Questions:

This interview is to get a bit of your background and career history. It will be open ended to gain an understanding of the participant's background and career history.

What the participant thinks is important in his or her life and career.

1. Tell me little bit about yourself, your background and how you chose your career? (Ask the participants about their education). Tell me how you eventually came to take up the role you now have? (You need to be very attentive and randomly interject and probe).

2. Briefly describe your role and its tasks and what a typical day and week look like?

3. What do you like most and least about the work that you do? Ask them also to provide a reason.

4. Overall, how many outsourced projects have you led? Describe a highly-successful outsourced project that you led and one that was not successful?

5. What do you think is important in life?

6. What do you think is important in your work environment? If you had to describe your ideal work what would it look like?
APPENDIX 3

RESEARCH REFLECTIONS

The following types of reflections are described and can to be used in research field notes.

**Categorizing memos**

**ON:** Observation note – what I saw, heard, felt, tasted

**MN:** Methodological notes – notes to myself about how to collect data, who to talk to, when to phone, what to wear

**TN:** Theoretical notes – hunches, hypothesis, connections, alternative interpretations, critiques of what you are doing, thinking or seeing.

**PN:** Personal notes - these are your feelings about the research, who you are talking to, your doubts, anxieties and pleasures (mood and emotions to understand what you feel about what was discussed)

**Context summary sheet**

1. Contact type (phone/visit)

2. Site

3. Date of contact

4. Today's date (of notes and transcription)

5. Author

6. Main issues or themes that had an impact on you on contact

7. Summary of information obtained (or not) for target questions

8. Any other salient, interesting, thinking or important points

9. New or remaining target questions for the following contact session with the person.
# APPENDIX 4

## The BarOn EQi-instrument


Table 3

*Subscales and definitions of the BarOn EQi* (Stein & Book, 2006, p 22-23)

<table>
<thead>
<tr>
<th>BarOn EQ-I subscales and definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Intrapersonal skills</strong></td>
</tr>
<tr>
<td>Self-awareness: Ability to recognize how you're feeling and why you're feeling that way and the impact your behavior has on others</td>
</tr>
<tr>
<td>Assertiveness: Ability to clearly express your thoughts and feelings, stand your ground and defend a position</td>
</tr>
<tr>
<td>Independence: Ability to be self-directed and self-controlled, to stand on your own two feet</td>
</tr>
<tr>
<td>Self-regard: Ability to recognize your strengths and weaknesses and to feel good about yourself despite your weaknesses</td>
</tr>
<tr>
<td>Self-actualization: Ability to realize your potential and feel comfortable with what you achieve at work and in your personal life.</td>
</tr>
<tr>
<td><strong>Interpersonal Skills</strong></td>
</tr>
<tr>
<td>Social responsibility: Ability to be a cooperative and contributing member of your social group</td>
</tr>
<tr>
<td>Empathy: Ability to understand what others might be feeling and thinking</td>
</tr>
<tr>
<td>Interpersonal relationships: Ability to forge and maintain relationships that are mutually beneficial and marked by give and take and a sense of emotional closeness</td>
</tr>
<tr>
<td><strong>Adaptability Realm</strong></td>
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<tr>
<td>Reality testing: Ability to see things as they actually are, rather than the way you wish or fear they might be</td>
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<tr>
<td>Problem-solving: Ability to define problems, then move to generate and implement effective, appropriate solutions</td>
</tr>
<tr>
<td>Flexibility: Ability to adjust your feelings, thoughts and actions to changing conditions</td>
</tr>
<tr>
<td><strong>Stress Management Realm</strong></td>
</tr>
<tr>
<td>Stress tolerance: Ability to remain calm and focused, to constructively withstand adverse events and conflicting emotions without caving in</td>
</tr>
<tr>
<td>Impulse control: Ability to resist or delay a temptation to act</td>
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<tr>
<td><strong>General Mood Realm</strong></td>
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<tr>
<td>Optimism</td>
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<tr>
<td>----------</td>
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<tr>
<td>Happiness</td>
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