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From the Editor

June 2022

Welcome to the 42nd issue of the *International Leadership Journal*, an online, peer-reviewed journal. This issue contains two articles, one pedagogy piece, and two viewpoint pieces.

In the first article, Santiago and Terrell used a qualitative case study to explore leader–employee interactions and activities within an innovation process supported by information systems and technology. Their results indicated that leaders and members focused on creativity, innovation, relationships, and the team; new ideas were offered and adopted; and leaders took corrective action during the innovation process.

Moore, Moore, and Bird used the Job Diagnostic Survey (JDS) to analyze the motivation and satisfaction levels of tellers at a regional credit union and linear regression to assess if a teller’s Motivating Potential Score (MPS) significantly predicted their self-reported level of job satisfaction. They found opportunities for credit union leadership to increase the autonomy, skill variety, and feedback of the teller’s job design and for leadership to address factors leading to the increase of growth satisfaction

In my pedagogy piece, I present a mini-case that allows users to focus on the multiple challenges facing the founder, owner, and manager of a counseling center, in coaching part-time counseling staff during the COVID-19 pandemic. The founder must determine the best coaching strategies for her staff for them to deliver the most effective professional counseling services to current and new clients, despite varied professional backgrounds, work experiences, and individual levels of counseling skills and abilities.

In the first viewpoint piece, Lorange discusses the dilemmas that arise when passing on wealth in family businesses, both from his own experience and other examples. He notes that there seems to be a clear trend toward equal redistribution of inherited wealth among the members of the next generation and provides recommendations to make this process more harmonious.

Finally, Bhalla and Toader draw on previous research make robust deductions about millennials’ potential attributes and limitations in CEO roles as they take over for previous generations. Underpinning these inferences is the recognition that millennials have redefined leadership; millennial leaders are keen agents for change and innovation, prioritizing an inclusive approach focused on people development as well as “soft” concerns of well-being over financial reward.

Please spread the word about *ILJ* to interested academics and practitioners and remember to visit <http://internationalleadershipjournal.com>. Also, feel free to propose a topic and be a guest editor of a special issue by contacting me at jcsantora1@gmail.com.

Joseph C. Santora, EdD
Editor

ARTICLES

Attainment of Innovative Performance in an Information Systems-Supported Innovation Process*

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The purpose of this qualitative case study was to explore leader–employee interactions and activities within an innovation process supported by information systems and technology. This study is important to practitioners and scholars considering alternative ways to objectively corroborate team and individual innovative performance. Six project team members completed open-ended questionnaires, and their responses were analyzed using theoretical thematic analysis. Organizational documents were analyzed using qualitative document analysis. The data collected indicated that leaders and members focused on creativity, innovation, relationships, and the team; new ideas were offered and adopted; and leaders took corrective action during the innovation process. The results increased knowledge and literature on leadership for innovation, enhanced understanding of leaders' and employees' ambidextrous behaviors during the innovation process, and gave insights into the nature of leader–employee interactions while pursuing innovation. Findings led to the conclusion that innovation practitioners and scholars could corroborate innovative performance objectively by documenting innovation processes.

Key words: ambidextrous behaviors, creativity, innovative performance, open-ended questionnaire, qualitative case study

Rosing et al.'s (2011) ambidexterity theory of leadership for innovation proposes that leaders flexibly apply complementary sets of behaviors to changing requirements in an innovation process to nurture sets of behaviors in individuals and teams. Leaders might impose changes to govern team dynamics and innovation processes (Acar et al., 2019). Employees may adjust to leaders' changes and project requirements. Thus, leaders' behaviors could affect creativity and innovation (Hughes et al., 2018). Relationships between employees and leaders could also affect how work gets done or vice versa.

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Leaders employ information systems and technology (IST) to improve performance and results. Leaders also rely on teams to innovate and deliver solutions in response to a firm's operating environment (Thayer et al., 2018). This is what Teece et al. (1997) considered *dynamic capabilities*—those capabilities oriented toward executive levels of the organization. Meanwhile, ordinary capabilities manifest in operations and management functions (Teece et al., 2016).

The ambidexterity theory of leadership for innovation literature underscored several interrelated limitations. First, Alghamdi (2018), Oluwafemi et al. (2020), and Zacher et al. (2014) were unable to corroborate employee-claimed innovative performance because they relied solely on claims made by employees. Second, the captured data did not relate to a specific innovation process, preventing leaders and scholars from gaining varied perspectives about the project activities and interactions occurring while undergoing an innovation process. Data linked to team activities and interactions could describe leaders' complementary sets of behaviors used to address changing requirements in an innovation process and any employee behaviors caused by the behaviors of the leader. Third, a single source of information could lead to misreporting.

Zacher et al. (2014) and Zacher and Wilden (2014) showed that people were eligible to partake in their studies if they claimed to be employed and interacted often with their supervisors; thus, employee-supervisor interactions did not have to relate to an innovation process. Interactions unrelated to the innovation process could prevent understanding of ambidextrous behaviors occurring in innovation processes and whether the interactions being investigated related to the same innovation process. Capturing data linked to one innovation process and underscoring interactions between leaders and employees associated with the fulfillment of an innovation process is critical to aligning a research study with the ambidexterity theory of leadership for innovation. It is, therefore, necessary to capture data from leaders and employees working together in the same innovation process.

Zacher and Rosing (2015) had team leaders rate their teams' innovative performance while employees rated their leaders' ambidextrous behaviors. It is evident that each group—leaders and employees—assessed a different aspect of

innovative performance. That, in turn, prevented the capturing of viewpoints from leaders and employees about the same aspect of innovative performance; particularly, leaders' and employees' ambidextrous behaviors employed in an innovation process.

Scholars have clearly studied employee innovative performance and ambidextrous behaviors, but the studies did not adequately align with the ambidexterity theory of leadership for innovation for two reasons. First, the data collected did not relate to a specific innovation process and the interactions leaders and employees had to fulfill the innovation project. This is important because Rosing et al. (2011) emphasized that the ambidexterity theory of leadership for innovation is one of direct and frequent interaction between leader and employees. Second, the data did not shed light on leaders' complementary sets of behaviors and whether such behaviors nurtured employees' innovative behaviors.

With respect to IST, Alsharif et al. (2018), Orbach et al. (2015), and Stepanova et al. (2018) revealed that IST—considered enablers of business functions—may not be fulfilling its supporting roles. Thus, uncertainty exists about the impact IST competency and innovation capacity have on organizational agility. Concerning dynamic capabilities, if leaders cannot rely on teams to innovate and address changes to the business operating environment, an organization might not be able to compete (Teece et al., 1997). Accordingly, the specific problem investigated was that scholars (Alghamdi, 2018; Oluwafemi et al., 2020; Zacher et al., 2014; Zacher & Rosing, 2015; Zacher & Wilden, 2014) did not collect descriptive data that could help assess the complementary sets of behaviors leaders employed to address changing requirements in an information systems-supported innovation process and whether such behaviors nurtured employees' innovative performance. Thus, scholars could not appreciate how leaders' ambidextrous behaviors and those of team members interface during the innovation process.

Considering the abovementioned problem, this qualitative case study explored leader–employee interactions and activities within an innovation process supported by IST to gain understanding of leaders' complementary sets of behaviors for dealing with changing requirements in an innovation process, whether a leader's

behaviors nurtured employees' innovative performance, and if IST enabled or inhibited the innovation process. The selected case was a domestic nonprofit firm headquartered in the Southeast of the United States and its finalization of a call center innovation project. The constructivist approach was adopted.

Research Questions

The principal and sub-questions used in this research study were as follows:

Principal Research Question

***Research Question:** How do leaders employ complementary sets of behaviors to deal with changing requirements in an IST-supported innovation process and nurture employee ambidextrous behaviors?*

Research Sub-Questions

***Research Sub-Question 1:** How do leaders and their employees working together in an IST-supported innovation process describe their ambidextrous behaviors?*

***Research Sub-Question 2:** How do leaders and their employees describe the innovation process being researched?*

***Research Sub-Question 3:** How do leaders and their employees describe the way IST enables or inhibits their ambidextrous behaviors for the fulfillment of the innovation process?*

Literature Review

Innovation is comprised of two essential processes: creation of new ideas (creativity) and implementation of those ideas (innovation; Alghamdi, 2018; Rosing et al., 2011). Alghamdi (2018) underscored that employee innovative performance referred to the behaviors of employees aimed at the implementation of the new ideas. However, the attainment of innovative performance requires ambidexterity (Rosing et al., 2011).

Rosing et al. (2011) pointed out that the requirement for ambidexterity in an innovation process calls for a leader to nurture explorative and exploitative behaviors on employees. To that end, leaders perform opening behaviors by giving

team members room for independent thinking, experimentation, and deviation from established approaches (Jørgensen & Becker, 2017; Rosing et al., 2011). These behaviors should nurture employee exploratory behaviors, such as developing new ideas and discovery (Jørgensen & Becker, 2017; Rosing et al., 2011). Meanwhile, leaders perform closing behaviors by taking corrective action, setting specific guidelines, and monitoring goal attainment (Jørgensen & Becker, 2017; Rosing et al., 2011). These closing behaviors should nurture employee exploitative behaviors such as improving processes and conducting problem-solving activities (Jørgensen & Becker, 2017).

The extant literature on supervisor–employee ambidexterity does not feature studies on innovation-process interactions, ambidexterity, innovative performance, and IST related to one innovation process, or ambidexterity within a time and context, which stresses the importance of this study. Caniels et al. (2017) accentuated this literature gap, underscoring the need for studies focusing on innovation-related interactions between a supervisor and employees. The ambidexterity literature omitted IST as a contributing or inhibiting factor to an innovation process. Prior research stressed the need for detailed case studies to enhance understanding of contextual ambidexterity (Raisch & Birkinshaw, 2008).

Ma et al. (2019) recently published the first empirical study assessing ambidexterity within a hospitality and service context; it is the first focused on the interactions and activities of an IST-supported innovation process involving team leaders and employees. This study is important to leaders and scholars, as it considered ways to objectively corroborate team and individual innovative performance.

Methods and Procedures

In this qualitative case study, the call center innovation project and the research study were executed virtually. The organization's virtual operating approach drove the decision to conduct the research study virtually. Fortunately, virtual execution facilitated anonymous data collection.

A qualitative case-study methodology was selected based on Yin's (2018) position that case studies can be conducted to study a phenomenon in real life and

capture rich descriptive data. The participating organization was chosen because it had a team undertaking an innovation project (the call center) supported by IST. Additionally, the innovation project was going to be in progress during the period of data collection. The unit of analysis was a team because the ambidexterity theory of leadership for innovation applies to teams and individuals. Purposive sampling was used to generate substantive responses to the research questions.

The research problem was addressed with a four-element conceptual framework (see Figure 1). The first and chief element is the ambidexterity theory of leadership for innovation, to investigate the knowledge gap in the literature. The second element is leader–member exchange theory, and the third element is the dynamic capabilities framework. IST literature is the fourth element because firms drive innovation by employing IST. Thus, this study looked for evidence of IST enabling or inhibiting ambidextrous behaviors for the fulfillment of innovative performance during the innovation process.

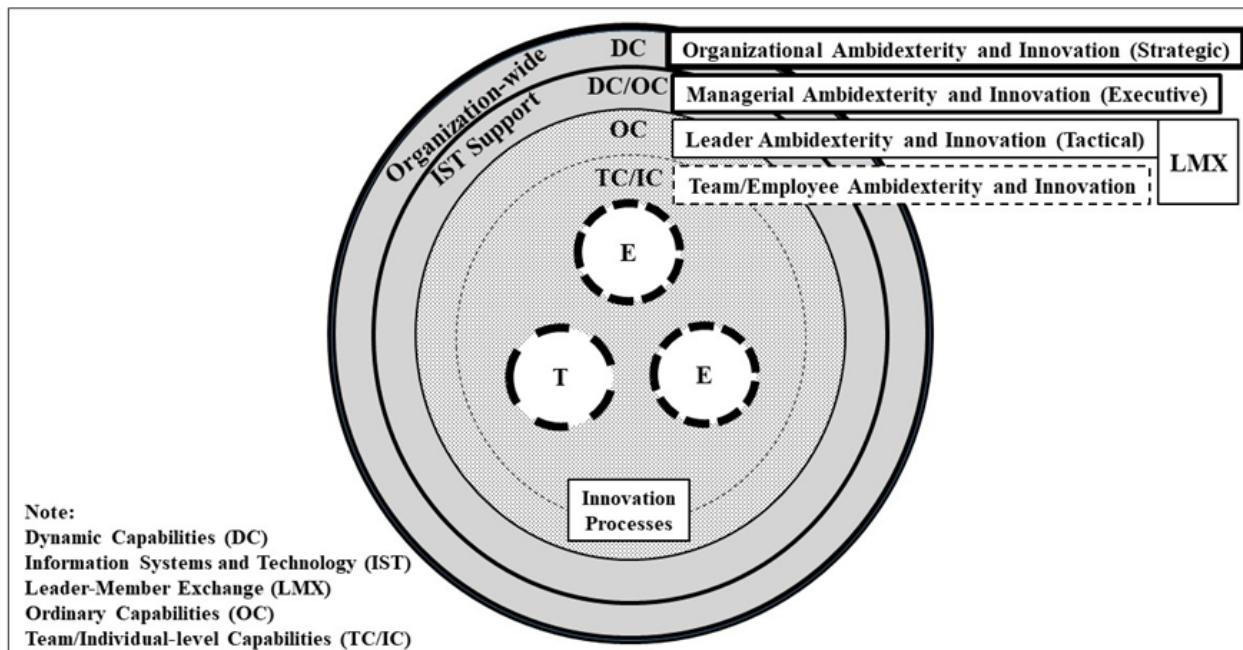


Figure 1. Conceptual framework for IST-supported ambidexterity and innovation
 Source: Dr. Henry Santiago

Rosing et al. (2011) expanded the organizational-level focus of ambidexterity by applying the ambidexterity theory of leadership for innovation only to teams and individuals and focusing on the behaviors and interactions of leaders and

employees during an innovation process. During these interactions, employee performance could improve with positive leader–employee relationships (Cropanzano et al., 2017). This relates to Rosing et al.'s (2011) discovery of a consistent relationship between innovation and leader–member exchange (LMX) (Graen et al., 1982).

LMX theory relates to the study due to its known benefits from leader–member relationships (e.g., better employee performance) (Cropanzano et al., 2017). The dynamic capabilities framework complements the two theories because the capabilities aspect of the framework has been linked to employee-level activities (Helfat et al., 2007). Business leaders should incorporate IST into their business strategy to innovate (Alsharif et al., 2018) and implement IT governance (Nguyen et al., 2018) that integrates critical success factors (Holotiuk & Beimborn, 2017). One could link IST, innovation, and business dynamic capabilities. However, further research is needed to link leaders' and employees' ambidextrous behaviors and the interface that occurs through innovation process-related activities, interactions, and relationships.

Data Collection

Once the Institutional Review Board (IRB) gave approval to proceed with the study, data collection efforts and recruitment activities began. The first source of evidence was the data received from participants of the innovation project team through their completion of the anonymous open-ended questionnaire. The second source of evidence was documentation related to the project.

The organization's representative was e-mailed a request for documents related to the innovation project, as well as the research flyer in both English and Spanish, which contained web links to the anonymous informed consent process. Based on input from the organization's representative, the call center innovation project involved 10 individuals. These project participants were the only personnel from the organization considered for participation in the study and were provided the electronic copy of the research flyer.

Eight members of the call center innovation project completed the anonymous informed consent process for accepting/rejecting the conditions of the study online.

Acceptance gave individuals access to the questionnaire links; however, they could only select and complete one questionnaire. Ultimately, six individuals completed either the team-member or team-leader questionnaire. The three completed team-member questionnaires were labeled M1 to M3, and the three team-leader questionnaires were labeled M4 to M6.

The anonymous informed consent process and both versions of the questionnaire were created on SurveyMonkey.com. Each question on the questionnaires included a text box in which participants could type their responses. Participants were encouraged to provide as much detail as they wished. Responses written in Spanish were sent to a linguist for translation into English so that responses could be analyzed and considered for inclusion in the final report. The linguist signed a nondisclosure agreement prior to the IRB review.

Data Analysis

Theoretical thematic analysis (Jørgensen & Becker, 2017) was used to analyze the responses from the six questionnaires: three persons completed the team member questionnaire, and three persons completed the team leader questionnaire. Each completed questionnaire was assessed individually and read twice. Reflections were then captured in a Microsoft Word document after a subsequent review. Beneath the reflections, the first research sub-question was listed along with the numbers of the questionnaire questions aligned with the research sub-question. This step facilitated the process of solely reviewing responses of questionnaire questions aligned to each research sub-question. A reflection was documented for the responses to each of the 22 questions on the questionnaires. These individual reflections were then used to draft a summary of reflections for the questionnaire responses aligned to the research sub-question. The same process was repeated for the other sub-questions. After drafting summaries of reflections for all sub-questions, the process moved to searching for elements of the conceptual framework in the questionnaire responses. To conduct the search, topics and themes from each element were generated using the literature referenced in the study.

The evidence found was underlined, and a note was written next to it denoting the specific conceptual framework element. The evidence found was also copied into the same Word document in which the reflections of responses were recorded and arranged under the appropriate research sub-question. The next step was drafting a response to each research sub-question combining each summary reflection with its corresponding conceptual framework evidence supported with quotes. A response was then drafted for the principal research question using responses to the research sub-questions supported with quotes. Lastly, all responses to each research question supported with quotes on each questionnaire were captured in a Word document for final review.

Qualitative document analysis (Wood et al., 2020) was used to assess organizational documents. The same conceptual framework topics/themes used to search for evidence in questionnaires were used to look for evidence in documents. The goal was to use the evidence found to gain understanding of any association between the documents' content and questionnaire responses.

Trustworthiness and Triangulation

Credibility was achieved using two data collection methods and attaining triangulation of data. Rich descriptions of findings and results in the aggregate were provided in the final report with quotes to enhance the robustness of the chain of evidence. Dependability was achieved by creating a database to establish a reviewable chain of evidence and trustworthiness from the research questions to the final report. Organizational documents remained in their original format to avoid duplicates and an unneeded increase in the database.

Confirmability was achieved by drafting reflections of the understanding of findings from the data collected, which contributed to the creation of an audit trail. Transferability was attained by rich descriptions of the case within the context in which it was investigated, supported with quotes. Triangulation of questionnaire responses was conducted separately from the triangulation of organizational documents; triangulation was then conducted using the overall triangulation results of both sources of data to gain the overall picture of the data collected.

Results

Responses to research questions, which are provided in the aggregate, discuss findings of leader–member activities and interactions. The principal research question is addressed first, followed by the sub-questions. This is followed by a brief discussion of inconsistencies in questionnaire responses.

Response to the Principal Research Question

How do leaders employ complementary sets of behaviors to deal with changing requirements in an IST-supported innovation process and nurture employee ambidextrous behaviors?

Overall, participants described complementary sets of behaviors positively and as team oriented. M6 noted that “the [initial] idea was to have a small group . . . in one place receiving calls . . . [with] only one phone number published.” However, in allowing room for new ideas, M6 commented that “we interviewed people knowledgeable in the call center field. Hence, emerged the idea of this remote system that allows each volunteer to have the call system in their personal phone.”

All activities were reportedly collaborative and recurrent, giving evidence of team leader and member ambidextrous behaviors interfacing in the innovation process. For example, M2 stated that “during meetings, communication that facilitates the flow of ideas and recommendations is encouraged.” This statement suggests that a leader gave room for independent thinking (leader opening behavior) to encourage team members to come up with new ideas (employee explorative behavior).

Response to Research Sub-Question 1

How do leaders and their employees working together in an IST-supported innovation process describe their ambidextrous behaviors?

M3 described his perceived liberty to engage in explorative behaviors: “I always enjoy complete freedom of movement from the [call center] director.” From a leader’s viewpoint, M6 commented that “I encountered only common communication and task-completion setbacks, which were resolved with follow-up and a follow-up schedule.” M1 expressed that “I discovered some procedural

errors in the protocol. I called, reported my findings, and the individuals in charge . . . made the necessary corrections.” These quotes exemplify leader closing behaviors.

Response to Research Sub-Question 2

How do leaders and their employees describe the innovation process being researched?

Participants provided many substantive descriptions of the innovation process. M1 expressed that “there is only one government call center. . . . This line is used for all types of situations/cases.” M1 went on explain that “the call center is a project aimed at helping to prevent suicidal behavior.”

M3 noted that “each person had a role; however, there were times when the roles had to be redefined to move the project along.” M6 said that “another leader worked on the implementation and training of the new communication system with the team.” Reportedly, SWOT was used to evaluate phone system options.

The provided call center overview document, which discussed the virtual phone system, referred to a February 2019 meeting, and the draft call center protocol was dated September 5, 2020. According to the organization’s representative, the implementation period was set for December 2020 to January 2021. Together, these dates suggest the innovation process lasted roughly two years.

Response to Research Sub-Question 3

How do leaders and their employees describe the way IST enables or inhibits their ambidextrous behaviors for the fulfillment of the innovation process?

Participants provided substantive examples of the way IST enabled the innovation process. M1 said that “the process used to determine how each step would be carried out was structured. There were Zoom meetings, phone calls, and written communication.” M2 stated that “a participatory communication procedure was implemented to allow all team members to exchange ideas, make recommendations, and stay up to date. . . . To achieve this objective, we had frequent virtual meetings.”

None of the participants indicated that IST inhibited the innovation process. Rather, participants gave responses to the contrary. For example, M2 said that “there is/was no information systems and technology tool impeding the innovation process of the call center project.” The IST reportedly employed to advertise the call center, communicate, recruit, and train included Facebook, WhatsApp, Zoom, and e-mail.

Inconsistencies in Questionnaire Responses

One inconsistency discovered was about project disruptions, which elicited contradictory responses. For example, one leader said that “the earthquakes changed our focus momentarily, and the pandemic limited the way we communicated and planned.” However, another leader noted that “we have had no major setbacks.”

Discussion

Questionnaire answers and documents jointly generated responses that directly answered all research questions and helped describe a multiyear innovation process. Leader opening and closing behaviors interfaced with employee explorative and exploitative behaviors and all behaviors related to the innovation process. Innovation was associated with LMX relationships, and dynamic capabilities helped institute a new service. The IST used in the innovation process enabled ambidextrous behaviors, and the IST adopted for the call center made its functions possible. Also, the essential processes of innovation were evident—new idea creation and the implementation of these ideas.

Interpretation of Findings

Regarding the principal research question, all members of the innovation team sustained good working relationships, open communications, cared for the well-being and success of the team instituting the call center, and experienced positive and productive interactions and activities. The team’s working environment likely served as a foundation for the collective efforts expressed by participants; particularly, efforts to search for phone system options that led to changing the initial

call center concept. The experienced working environment possibly helped leaders nurture employee ambidextrous behaviors that enabled innovative performance.

For Research Sub-Question 1, evidence of a team member being allowed to be creative and leaders taking corrective action indicated employee explorative behaviors and leader opening behaviors. They also serve as evidence of ambidextrous behaviors of leaders and members interfacing in the innovation process. Call center protocol corrections and instituting follow-ups to ensure task completion signaled leaders' closing behaviors. The cohesiveness of the team personnel and their care for one another demonstrated evidence of leader-member-exchange relationships over the life of the project.

For Research Sub-Question 2, choosing a virtual phone system took more than a year, and planning reportedly lasted 10 to 12 months. The team took 4 to 5 months to finish and certify the protocol. The innovation process, thus, lasted multiple years. Dynamic capabilities helped detect a new service and restructure the firm.

For Research Sub-Question 3, IST fulfilled many support roles. The reporting of IST's constant reliability suggests that the IST worked as intended and users were adept at using them. Reporting that the IST had no disruptions may indicate a well-maintained information systems infrastructure.

Relating Study Results to the Literature

Leaders applied complementary sets of behaviors to the changing requirements of the call center innovation project and fostered employees' exploratory and exploitative behaviors. This finding directly relates to Rosing et al.'s (2011) ambidexterity theory of leadership for innovation. Particularly, the theory suggests that leaders apply complementary sets of behaviors to the changing requirements of an innovation process.

The relationships between team personnel were described as solidifying over the life of the project. Rosing et al. (2011) also noticed the connection between innovation and LMX relationships. Since the call center was implemented, one may align team personnel relationships and the project outcome with Kariuki's (2020) discovery that high self-efficacy positively correlates with high LMX. The study's

results aligned with those of Luu (2017), who noted that leaders may use ambidextrous behaviors to stimulate employees to create and implement ideas. The data collected also showed that leaders adopted ideas offered by team members; thus, the initial plan changed.

The study's results also relate to Helfat et al. (2007), in that dynamic capabilities may help create a new product. In line with Teece (2012), the project team assessed the idea of creating a call center, recruited and trained volunteers, explored virtual technology for the call center, wrote a call center protocol, and implemented the call center. The results aligned with the use of questionnaires to capture descriptive narratives (Braun et al., 2017; Frishammar et al., 2019). Narratives described innovation process activities, change in innovation project/process requirements, interactions and relationships, the interface of leaders' ambidextrous behaviors with those of their employees, the use and dependability of IST, and innovation—producing a new idea and implementing it.

Implications

Leaders and practitioners should document descriptive narratives of innovation project activities, processes, and interactions. The goal is to help leaders corroborate employee innovative performance, assess leader–employee interactions, and determine whether leaders nurture or inhibit employee innovative performance. The descriptive narratives from participants of the call center innovation project revealed that leaders applied complementary sets of behaviors to the changing requirements of the call center project. Moreover, the results showed that leaders' complementary sets of behaviors fostered employees' exploratory and exploitative behaviors. In this manner, the study showed that leaders gave team members the opportunity to be creative (e.g., offer ideas openly) and leaders contributed to team-member employee innovative performance (e.g., incorporating ideas into the project plan).

Leaders and practitioners are encouraged to establish an adequate atmosphere for an innovation project. The results showed that the innovation project in this case study exhibited a positive, collaborative, and productive atmosphere that

ultimately concluded with the implementation of the call center. The characterization of team-personnel relationships as solidifying over the life of the project could be an indication of successful recruitment of individuals for participation in an innovation project.

Leaders and practitioners should identify their dynamic capabilities and ensure that they are well integrated to improve a firm's performance and ability to innovate. The study revealed the activities used to create the innovation project team and implement the call center. These activities were enabled by the organization's dynamic capabilities being intertwined at various levels.

Open-ended questionnaires enabled the capturing of descriptive narratives of innovation project activities and interactions. Leaders and practitioners could employ a similar method of data collection to capture narratives from project participants. If leaders and employees partaking in the project were asked to provide feedback on the same aspect of a project, responses might reveal diverse viewpoints and insights about the explored areas. Responses may also help assess whether the technology supporting the innovation project is adequate or different technology is needed. Thus, descriptive responses might need to be collected regularly as the project progresses.

Limitations of the Study

The first limitation was that one of the two prospect organizations became unavailable due to the coronavirus pandemic. However, the leader of the remaining organization, already operating virtually, agreed to support the study. The second limitation was that the company only provided two documents to support the study—a call center overview file and a draft protocol.

Recommendations for Future Research

Scholars may conduct a correlational study posing the same questions to leaders and employees to obtain varied viewpoints of the innovation project. Alghamdi (2018) asked respondents to rate supervisor's leader behaviors, but supervisors

did not partake in the study. Supervisor data could be used to assess the relationship between the ambidextrous behaviors of supervisors and employees.

Since the data collected in this qualitative case study linked participants' ambidextrous behaviors to the innovation project, a factor analysis study is recommended to identify underlying factors affecting leader ambidexterity at different points in the life of the project, and if variations in leader behaviors influence those of team members. Periods of particular interest for the study would be when changes to the innovation project/process occur. Alghamdi (2018) used an exploratory factor analysis to evaluate employees' (faculty members) rating of their leaders' opening and closing behaviors. Ultimately, the relationship between each leader behavior and each employee behavior was found to be positively and statistically significant. However, the study did not consider changes to an innovation project/process already in progress, and leader data were not collected to validate the responses provided by the employees.

Conclusion

Leaders and practitioners may apply the results of this qualitative study in several ways. First, they should learn or increase their knowledge and understanding of ambidextrous behaviors of leaders and employees and the manner in which leaders can apply complementary sets of behaviors to changing requirements in innovation processes to nurture employee behaviors that enhance their innovative performance. Perhaps one leader or practitioner can become a subject-matter expert on ambidextrous behaviors, then establish an organizational training program to develop leader and employee ambidexterity.

Second, leaders and practitioners need to generate opportunities for employees to contribute to innovation processes. Those are the moments when leaders and practitioners employ their opening behaviors to stimulate employee creativity (e.g., help develop the initial plan and allow individuals to choose how to perform a task). When controls are implemented to ensure team members stick to timelines and achieve milestones, leaders and practitioners have used leader closing behaviors. Team-member activities oriented toward implementing what was created are

associated with employee innovativeness. As noted by Thayer et al. (2018), organizational leaders rely on teams to innovate and deliver solutions.

Third, leaders, practitioners, and employees should be clear on the distinction between creativity and innovation. In particular, the former relates to developing novel ideas (e.g., new product, process, or service), while the latter is concerned with the implementation of the idea. Until then, it is an exercise of creativity. Possessing a clear understanding of creativity and innovation will enable leaders and practitioners to evaluate descriptive narratives and determine the extent of employee creativity and innovation for each innovation process.

Fourth, leaders and practitioners should build and nurture suitable relationships and teamwork with team members, and team members need to build relationships between each other. Open and transparent lines of communication will be necessary to enhance relationships between team personnel and move the project forward, but the project leader needs to actively encourage members to communicate frequently and openly while executing the innovation project. It is through the openness of dialogue and collective work that they will reach milestones such as developing the initial innovation project plan and the process to be executed, identifying the technology and other types of support needed, conveying issues and recommendations, engaging in team-building activities, and implementing the project, among other activities. As noted by Muchiri et al. (2020), high quality leader–member relationships could foster innovative work behaviors.

Fifth, leaders and practitioners should understand the way that project activities tie into organizational and managerial functions. In other words, they need to understand the interweaving of dynamic capabilities from different levels of the firm. As noted by Helfat et al. (2007) and in this qualitative case study, dynamic capabilities can contribute to creating something new (e.g., new product or service). Brink (2019) also noted that the interaction between dynamic and ordinary capabilities helps create new knowledge for innovation, and Popadiuk et al. (2018) underscored that dynamic capabilities help identify opportunities for innovation.

This case study explored leader–employee interactions and activities within an innovation process supported by IST. Its results revealed that leaders and team

members displayed ambidextrous behaviors and corroborated innovative performance. Findings will be of interest to leaders, practitioners, and scholars considering alternative ways to objectively corroborate team and individual innovative performance. This study contributes to the existing knowledge and literature on leadership for innovation, enhances understanding of leaders' and employees' ambidextrous behaviors during the innovation process, and provides insights on the nature of leader–employee interactions while pursuing innovation.

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Appendix A: Instructions for Completing the Open-Ended Questionnaire (Team Member)

Greetings, and thank you again for agreeing to participate in the nonscientific study titled *Ambidexterity for Innovative Performance: An Instrumental Case Study of an Information Systems-Supported Innovation Process*. This study explores the call center project in terms of the innovation process and steps followed, varied perspectives of team social interactions, employee innovative performance, and activities that pertained to the project. It also examines the extent of information systems and technology (IST) support and looks into the actions applied to changing requirements while executing the project. This study is very important for understanding team-level innovation processes.

As part of your support of the study, you are asked to fill out this questionnaire of 22 open-ended questions. The more detailed descriptions and explanations you can provide, the greater your contribution will be to the completion of this research and the better the knowledge gained by the research community. As such, you are asked to provide essay-like responses. Each page has one question and a shaded text box for you to type your responses. Please do not write your name on the questionnaire to maintain your anonymity.

If published, the results of this study will enhance readers' understanding of the team efforts, work required to fulfill an innovation project, and extent of IST support. As per the consent form, your participation is voluntary; you may elect not to answer any of the questions and can withdraw from the study without repercussions. You are asked to complete the questionnaire without anyone's assistance and return it within 10 days from the day you received it. You may simply reply to the original e-mail message you received with the blank questionnaire and attach the completed questionnaire to it. Should you have any questions or concerns, you may contact the researcher at any time. Thank you again for supporting this important study.

Open-Ended Questions

1. Explain what the call center project consists of.
2. Describe the way the call center project team was created.

3. Describe the way the initial plan for the call center project was created.
4. Describe what the team did with the initial project guidelines to begin the creation of the call center.
5. Describe the procedure used for the selection of the innovation process that the team executed for the creation of the call center.
6. Describe the way your performance behaviors affected the innovation process.
7. Describe and give an example of the degree of freedom your team leader gave you for generating and trying your own ideas to fulfill the call center project.
8. Describe and give an example of the steps you followed to generate new ideas for the call center project.
9. Describe any limitations or restrictions the team leader enforced and the impact on the project.
10. Describe the innovation process the team executed to create the call center.
11. Describe and give an example of the way you handled setbacks, mistakes, or modifications to the project requirements.
12. Describe and give an example of what encouraged you to develop new ideas for fulfilling the call center project requirements.
13. Describe your project-related interactions and activities with the team leader as the call center project progressed.
14. Describe the performance behaviors the team leader exhibited while executing the call center project.
15. Describe any changes to your professional and personal relationships with your team leader since the start of the call center project and why they occurred.
16. Describe any conditions that forced the team leader to stop or modify activities being conducted for the call center project.
17. Describe how you adjusted to the team leader's stopping or modifying of project activities.
18. Describe the procedure used to determine how the team carried out each step of the innovation process.
19. Describe the information systems and technology (IST) tools that *enabled* the innovation process used for the call center project.

20. Describe the IST tools that *inhibited* the innovation process used for the call center project.
21. Describe the process used to determine the IST support needed to fulfill the requirements of the call center project.
22. Describe the resources that leaders of the organization provided to the team to carry out the call center innovation project.

Appendix B: Instructions for Completing the Open-Ended Questionnaire (Team Leader)

Greetings, and thank you again for agreeing to participate in the nonscientific study titled *Ambidexterity for Innovative Performance: An Instrumental Case Study of an Information Systems-Supported Innovation Process*. This study explores the call center project in terms of the innovation process and steps followed, varied perspectives of team social interactions, employee innovative performance and activities that pertained to the project. It also examines the extent of information systems and technology (IST) support and looks into the actions applied to changing requirements while executing the project. This study is very important for understanding team-level innovation processes.

As part of your support of the study, you are asked to fill out this questionnaire of 22 open-ended questions. The more detailed descriptions and explanations you can provide, the greater your contribution will be to the completion of this research and the better the knowledge gained by the research community. As such, you are asked to provide essay-like responses. Each page has one question and a shaded text box for you to type your responses. Please do not write your name on the questionnaire to maintain your anonymity.

If published, the results of this study will enhance readers' understanding of the team efforts, work required to fulfill an innovation project, and extent of IST support. As per the consent form, your participation is voluntary; you may elect not to answer any of the questions and can withdraw from the study without repercussions. You are asked to complete the questionnaire without anyone's assistance and return it within 10 days from the day you received it. You may simply reply to the original e-mail message you received with the blank questionnaire and attach the completed questionnaire to it. Should you have any questions or concerns, you may contact the researcher at any time. Thank you again for supporting this important study.

Open-Ended Questions

1. Explain what the call center project consists of.
2. Describe the way the call center project team was created.

3. Describe the way the initial plan for the call center project was created.
4. Describe what your team did with the initial project guidelines to begin the creation of the call center.
5. Describe the procedure used for the selection of the innovation process that the team executed for the creation of the call center.
6. Describe the way your performance behaviors as team leader affected the innovation process.
7. Describe and give an example of the degree of freedom you gave team members for generating and trying their own ideas to fulfill the call center project.
8. Describe and give an example of the steps you followed to generate new ideas for the call center project.
9. Describe any limitations or restrictions you enforced on the team and the impact on the project.
10. Describe the innovation process the team executed to create the call center.
11. Describe and give an example of the way you handled team setbacks, mistakes, or modifications to the project requirements.
12. Describe and give an example of what encouraged team members to develop new ideas for fulfilling the call center project requirements.
13. Describe your project-related interactions and activities with team members as the call center project progressed.
14. Describe the performance behaviors team members exhibited while executing the call center project.
15. Describe any changes to your professional and personal relationships with team members since the start of the call center project and why they occurred.
16. Describe any conditions that forced you to stop or modify activities being conducted for the call center project.
17. Describe the way you saw the team adjusting to the stopping or modifying of project activities.
18. Describe the procedure used to determine how the team carried out each step of the innovation process.

19. Describe the information systems and technology (IST) tools that *enabled* the innovation process used for the call center project.
20. Describe the IST tools that *inhibited* the innovation process used for the call center project.
21. Describe the process used to determine the IST support needed to fulfill the requirements of the call center project.
22. Describe the resources that leaders of the organization provided to the team to carry out the call center innovation project.

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Credit Union Customer Satisfaction and Succession Planning: Leadership Is the Key*

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According to three credit union CEOs, focusing on the career development and succession of their younger workforce is vital to maintaining high levels of customer satisfaction. To fulfill the purpose of this study, the motivation and satisfaction levels of tellers at a popular regional credit union were analyzed using the Job Diagnostic Survey (JDS). By analyzing job-related factors, we determined what aspects of the teller position should be targeted for improvement and what aspects of the teller's job currently enhance their motivation and satisfaction. Linear regression was used to assess if a teller's Motivating Potential Score (MPS) significantly predicts their self-reported level of job satisfaction. Additionally, two separate ANOVAs and post hoc analyses were used to further assess differences in five different job dimensions and the type of satisfaction reported. Significance was found in all three tests. Opportunities for credit union leadership appear to include increasing the autonomy, skill variety, and feedback of the teller's job design. Also, leadership should address factors leading to the increase of growth satisfaction. The importance of professional mentorships and official succession planning programs is discussed and recommended.

Key words: credit unions, job diagnostic survey, JDS, leadership, mentoring, succession planning

Over the past 18 months, American credit unions continued to provide support to the national economy, which significantly sustained national and global operations during an international health crisis. The repercussions of this global pandemic are best understood through the impact on the American workforce. According to the U.S. Bureau of Labor Statistics (2021), unemployment had reached an all-time 20-year low (3.5%), at the pandemic's onset in January 2020. The last time unemployment rates were at similar levels was in December 2006 (4.4%), and that was almost a percentage point higher than the January 2020 rates. Just four months later in April 2020, total U.S. unemployment had skyrocketed to 14.8%. Most corporate industries were forced to quickly adapt physical work requirements to preserve and sustain operations during unprecedented global health challenges.

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Financial institutions were not exempt from these challenges, and in fact, most financial institutions became significant lifelines for economic sustainability. Maintaining liquidity was vital for businesses as well as families needing to pay mortgages, rent, wages, utility bills, and grocery bills. Financial institutions were some of the first businesses approached in partnership with the federal government, local governments, communities, and even individual members regarding the distribution of financial assistance required to maintain our economic standards and preserve the American way of life.

Interestingly, during the first quarter of 2020, employment at U.S. credit unions *increased* by 3.8% (Wessler, 2020). One way that credit unions countered the unemployment bubble was to invest more in full-time employees (which increased 3.8%) than in part-time employees (which decreased by 4.5%; Wessler, 2020). Even more importantly, credit unions managed to avoid laying people off during a time when a stable paycheck and health insurance was so highly coveted. According to Wessler (2020), “anecdotal evidence doesn’t suggest this trend will soon change, as credit union leaders express more interest in recruiting young, talented workers than downsizing payrolls” (para. 3).

The question “How can credit unions reach young workers? [and] why is that important?” was recently posed to three credit union CEOs (Wessler, 2020). Their answers emphasized the importance and long-term benefits of investing in a younger workforce. Diana Dykstra, CEO of California and Nevada Credit Union Leagues, responded:

Today’s younger workers want to explore how to make things better and how things can change. If we don’t give them the license to do that, they’re not going to walk through the door and say, ‘I want to work for a credit union.’ The average age of a credit union executive is getting older, and we need new, fresh ideas. Credit unions need to be open and not pigeonhole someone in a job title and function. (Wessler, 2020, Diana Dykstra section, para. 4)

Tom Ryan, CEO, of Langley Federal Credit Union, said:

We have an amazing group of younger employees at Langley. I’m impressed by the impact they make every day in our organization. We take great pride in creating a culture that provides employees the opportunity to develop and career paths for them to realize their aspirations. (Wessler, 2020, Tom Ryan section, para. 3)

Maurice Smith, CEO, of Local Government Federal Credit Union, emphasized:

[Young workers] want to feel they matter. They want products and services that meet their needs. They need credit unions to connect the dots between their ambition and our wherewithal to help them succeed. (Wessler, 2020, Maurice Smith section, para. 3)

All three CEOs specifically noted that their younger employees value opportunity, ambition, and the freedom to grow and develop as a worker. It is not unusual for entry-level credit union employees to be introduced into the organization as a teller. Tellers are considered the frontline employees responsible for helping members with day-to-day transactions such as withdrawals and deposits, transfers, and payments. While it is crucial that these tasks are done well and accurately, credit unions rely heavily on tellers to be the embodiment of their organizational values. Tellers are supposed to be welcoming, friendly, service-oriented, and sociable. Tellers are trusted to soothe frustrated members, know current rates and offers for members, and provide the best possible service to members, thus retaining memberships. It is the people in these positions who interact with members the most. Therefore, the demeanor, physical appearance, and attitudes of tellers are undoubtedly influential in the success of a credit union. It is apparent that the teller position, in most credit unions, is one area in which the younger and less experienced employees are found. It is also the position that, according to the three CEOs, should be a primary focus for grooming the next generation of loan officers, branch managers, and other financial executives.

Literature Review and Hypothesis Development

Determining a relationship between employee satisfaction and organizational success has been a significant topic of leadership-based research for decades. Successful credit unions' management generally recognizes that placing a focus on their employees' satisfaction has countless advantages, benefiting the organization in more than one area. Such benefits may include the minimization of employee turnover and the maximization of productivity. Gensing-Pophal (2010)

suggests that employee engagement and satisfaction are some of the main influences of a credit union's success.

Leadership and the Employee Satisfaction/Job Design Relationship

Motivation and job satisfaction are important drivers influencing tellers' behavior on the job. As demonstrated by prior research, employee morale is strongly related to customer satisfaction (Allred, 2001; Liberman, 2010). Members want to be served by an employee who appears satisfied, not by someone who looks like they would prefer to be elsewhere—and when members are satisfied with the service they receive, higher member retention, more relationship development, and member loyalty follow.

It is clear that tellers' motivation and satisfaction should not be dismissed by credit union management. In fact, it should be a focal point of the institution's plans for the successful implementation of organizational values and the promotion of future success. According to Duarte et al.'s (2016) study, credit unions will continue to grow and be strong competitors if they focus on transactional innovations and improvements in service quality, which require effective leadership.

Allred (2001) discussed consumers' preference to credit unions, referencing relationships between credit union member satisfaction and credit union employee satisfaction. According to a study by Schneider and Brown (1985, as cited in Allred, 2001), "research on bank employees and their customers found that employee morale was strongly related to customer satisfaction; that is, when bank customers perceived front-line employees to be *happy* with their work, bank customers were more likely to be satisfied with the service they receive" (180). Kerry Liberman (2010), president of People Perspectives, a company that creates credit union employee surveys, notes that "when employees are happy, they are more likely to treat their members well. This leads to higher member retention, more relationship development, and more member loyalty—things all credit unions are striving for these days" (30).

To fulfill the purpose of this study, the motivation and satisfaction levels of tellers at a popular regional credit union were analyzed using the well-known Job Diagnostic Survey (JDS), famously created by Hackman and Oldham (1975). All tellers, approximately 200 in total, employed by this credit union, were asked to respond to an online survey. Forty-one responses were captured; however, only

38 were used in the analysis of data, as three tellers provided incomplete responses. Of the participants, 87% indicated that they had only been in the teller position at the credit union between zero and four years, and 82% were female. As this is an entry-level position, it is not surprising that most of the participants were fairly young: 24% were 18 to 24 years old, 37% were 25 to 34 years old and 39% were 35 or older. As for the highest level of education earned by the respondents: 32% reported having only a high school education, 30% held associate's degrees, 30% held bachelor's degrees, 5% had technical or vocational training, and 3% held master's degrees. Analyzing job-related factors that influence tellers at this regional credit union should determine what aspects of the teller position should be targeted for improvement and what aspects currently enhance their motivation and satisfaction.

Research Question and Hypotheses

Research Question: *If tellers are the main interface with customers and are also an important pool of employees for succession planning purposes, what characteristics of the teller job need attention from leadership now, to ensure consistent customer satisfaction and a steady supply of future leaders?*

This study aimed to understand the impact that tellers' job tasks have on the overall satisfaction level of the employees. The JDS was used to identify potential negative job dimensions that may lead to employee dissatisfaction. Conversely, the JDS was also used to determine what parts of the tellers' jobs positively contribute to their motivation and success in the workplace. Finally, the overarching goal of this study was to connect indirect leadership efforts responding to the results of the JDS to the leadership development of future credit union management.

The statistical exploration of the following hypotheses was used to ensure further understanding of the research question.

Hypothesis 1: *Does a teller's Motivating Potential Score (MPS) predict their self-reported level of job satisfaction?*

Hypothesis 2: *Is there a significant difference in the population mean scores for the five different job dimension categories among the tellers in a regional credit union?*

Hypothesis 3: *Is there a significant difference in the population mean scores for the different types of satisfaction scores among tellers in a regional credit union?*

The Job Characteristics Theory

The *job characteristics theory* states that five core job dimensions—skill variety, task identity, task significance, autonomy, and feedback from the job—can significantly influence positive personal and work outcomes (Hackman & Oldham, 1975). Hackman and Oldham (1975) found that these job dimensions are positively related to measures of work motivation and satisfaction. They noted that these core job dimensions heighten three specific “critical psychological states” (162):

- meaningfulness of the work,
- responsibility for the outcomes of the work, and
- knowledge of the results of the work activities.

Leadership’s role and decision-making ability significantly affects the critical psychological states for employees. Specifically, the core job dimensions of skill variety, task identity, and task significance are three dimensions linked to increased meaningfulness. As leadership addresses issues identified with skill variety, task identity, and task significance, they are simultaneously aiming to increase the meaningfulness that employees feel in their jobs. High autonomy results in an increase of responsibility, and when an employee receives a high amount of feedback from their job, knowledge of results is increased. According to the job characteristics theory, all three of the psychological states must be experienced to have positive personal and work outcomes like high internal motivation, high work satisfaction, high-quality performance, and low absenteeism and turnover (Hackman & Oldham, 1975).

Using the five core job dimensions, a summary score can be found. The Motivating Potential Score (MPS) expresses the overall motivating potential of a specific job. Fundamentally, the theory states that if an employee feels that they are responsible for meaningful work outcomes and can see the effects of their work, and other work environment desires are met, then they will experience high motivation, performance, and satisfaction.

Method and Results

The job characteristics theory introduced a new way to measure employee motivation and satisfaction: the Job Diagnostic Survey. The survey strives to quantify the underlying theories formulated by Hackman and Oldham (1975). To do so, each question serves as a unique measuring device for an employee to rate the extent to which they experience a core job dimension or specific satisfaction in the workplace. A seven-point Likert-type scale ranging from 1 = very inaccurate/dissatisfied to 7 = very accurate/satisfied is used to calculate the MPS.

Statistical Results

Hypothesis 1: Does a teller's Motivating Potential Score (MPS) affect their self-reported level of job satisfaction?

A simple linear regression analysis was used to test if a teller's MPS significantly affects a teller's self-reported level of job satisfaction. The results of the regression indicated that the predictor variable, the MPS, explained approximately 14% of the variation in the dependent variable job satisfaction ($R^2 = .1399$, $F[1,36] = 5.85$, $p = .021$). It was found that a teller's MPS does significantly affect their self-reported levels of job satisfaction ($\beta = .07$, $p = .021$).

Hypothesis 2: Is there a significant difference in the population mean scores for the five different job dimension categories among the tellers in a regional credit union?

A one-way analysis of variance was conducted to evaluate the relationship between the population mean scores for the five different job dimension categories among the tellers in a regional credit union. The factor variable—job dimensions—included five groups: autonomy, task identity, skill variety, task significance, and feedback from the job. The dependent variable was the mean score for each of those groups. The ANOVA was significant ($F[4, 185] = 18.24$, $p < .001$).

Because the overall F test was significant, multiple post hoc comparisons were conducted to evaluate the pairwise difference among the means of the five groups. A Tukey procedure was selected for the multiple comparisons because equal variances were assumed. There was a significant difference in the means between

autonomy and task identity ($p < .05$) and between autonomy and task significance ($p < .05$). There was also a significant difference between skill variety and task identity ($p < .05$) and between skill variety and task significance ($p < .05$). There was also a significant difference between feedback from the job and task significance ($p < .05$). The data suggested that tellers perceive their job to have a statistically lower level of autonomy than task identity and task significance. The data also revealed that tellers perceive their job to have a statistically lower level of skill variety than task identity and task significance. Additionally, tellers reported a statistically lower level of feedback from the job than task significance.

Hypothesis 3: Is there a significant difference in the population mean scores for the different types of satisfaction scores among tellers in a regional credit union?

A one-way analysis of variance was conducted to evaluate the relationship between the population mean scores for the different types of satisfaction scores among tellers in a regional credit union. The factor variable—the different types of satisfaction—included five categories: general, security, pay, growth, and social. The dependent variable was the average score for each of the five types of satisfaction. The ANOVA was significant, ($F[4, 185] = 2.68, p = .033$).

Because the overall F test was significant, multiple post hoc comparisons were conducted to evaluate the pairwise difference among the means of the five groups. A Tukey procedure was selected for the multiple comparisons because equal variances were assumed. There was a significant difference in the means between security and growth satisfaction ($p < .05$). The data revealed that tellers have a statistically lower level of satisfaction regarding growth in the workplace than their level of satisfaction with the amount of job security they have.

Discussion

The purpose of this study was to better understand the motivating potential of the teller position and its relationship to job satisfaction, as defined by the JDS. The following are key findings to this study.

First, the teller position MPS appears to have a statistically significant positive relationship to the self-reported level of job satisfaction. Hackman and Oldham

(1975) stated that to obtain outcomes such as high internal motivation, high work satisfaction, high-quality performance, and low absenteeism and turnover, all five of the core job dimensions (as measured by the MPS) must be acknowledged and addressed by employers when crafting positions and job responsibilities within their organizations.

Second, significant differences were found between population mean scores for the five core job dimensions. The data revealed that tellers perceive their job to have a lower level of autonomy than task identity and task significance. This may be due to the straightforward procedures that comprise a teller's work. Rather than having alternative ways to accomplish tasks throughout the day, tellers have routine procedures set in place by their employer. Variance from these procedures typically result in errors or inefficiencies, so tellers generally follow these procedures closely. Regarding the scheduling of their work, tellers' tasks are based on whatever a credit union member asks of them; consequently, tellers have little say in the timing of their duties. According to Hackman and Oldham (1975), because of a lower level of autonomy, tellers experience less responsibility for work outcomes (a critical psychological state).

There were also indications that tellers perceive their job to have a lower level of skill variety than task identity and task significance. This could be attributed to the limited number of services that tellers are trained to provide to credit union members. Such tangible services include making withdrawals and deposits, transfers, and payments, and occasionally handling member account services. While this work does require skills and talents, it does not require a wide variety—math skills, interpersonal skills, and cash handling to name a few. While several skills are needed to be a teller, there are not many ways that these skills can be applied, as the tellers' tasks do not vary much in consistency.

Tellers also report a statistically lower level of feedback from the job than task significance. This could be attributed to the fact that while tellers do receive feedback from members, oftentimes it is periodic feedback from members via an anonymous feedback program. Tellers at this credit union do not have an opportunity to receive direct written feedback from the member right after they

serve them. The lower level of feedback from the job could also be a result of their supervisor failing to consistently provide feedback, as they have other responsibilities. According to Hackman and Oldham (1975), if employees receive a lower level of feedback on the job, they are also less knowledgeable of the actual results of their work activities (a critical psychological state); therefore, the potential for positive personal and work outcomes decreases.

Alternatively, the significantly higher level of task significance (in relation to feedback from the job, autonomy, and skill variety) could be related to the personal services that tellers are responsible for providing to credit union members. The tasks tellers are primarily responsible for, such as monetary transactions within a member's account, making sure account information is up to date, and sometimes even making product suggestions to members, are all undoubtedly important services that are expected to be performed accurately. Additionally, as credit unions are known for their service-oriented atmosphere, tellers are expected to go beyond members' expectations of service quality. Tellers are trained to be attentive to each member they help to provide the best possible service quality within the short period of time they have with each member. With these concepts being enforced in training and in company values, it is foreseeable that tellers would rate their jobs highly in this aspect.

The results also indicated a significantly higher level of task identity in relation to autonomy and skill variety. With tellers' tasks being dependent on individual members' requests, it is easy for tellers to identify the work they completed, as it can be distinguished by member, and the teller is usually the only worker completing the task. For example, if a member asks for funds to be transferred between their accounts, the teller performs this action from start to finish and can see the immediate results of their work with that member.

Third, tellers were found to have reported a statistically lower level of growth satisfaction (5.89) than security satisfaction (6.45). Growth in this context involves personal growth and development on the job through experiencing challenges and independent thought and action. The lower level of growth satisfaction reported by the tellers at this credit union could be related to the previously described routine

procedures that they conduct daily. With so much repetition and strict banking regulations for tellers to follow, there is little room for new challenges. However, tellers reported significantly higher levels of security satisfaction than growth satisfaction. In other words, tellers are generally unconcerned with the possibility of losing their jobs. This could be attributed to the fact that the credit union is in a unique period of growth and is projected to maintain consistent employment of full-time workers.

Finally, the average MPS for the teller position in this regional credit union was 130. The interpretation of the MPS, ranging from 1 to 343, has the following ranges:

- An MPS score of 200 to 343 indicates a job with high motivating potential.
- An MPS score of 120 to 199 indicates a job with moderate motivating potential.
- An MPS score of 1 to 119 indicates a job with low motivating potential

(Hackman & Oldham, 1975).

The MPS for the tellers' position fell on the lower end of the moderate category. While the average MPS was 130, the MPS for individual tellers ranged from a mere 25 to as high as 222. According to these findings, credit union leadership should recognize that there are some opportunities for enhanced job design simply based on the overall MPS.

Recommendations for Leadership

Research Question: *If tellers are the main interface with customers and are also an important pool of employees for succession planning purposes, what characteristics of the teller job need attention from leadership now, to ensure consistent customer satisfaction and a steady supply of future leaders?*

Autonomy

Overall, the data indicated that tellers employed at this regional credit union are moderately satisfied with their work. Nevertheless, there is always room for improvement. The tellers expressed statistically lower levels of autonomy than task identity and task significance. The teller position inherently has little autonomy. Tellers follow strict procedures and have little say in deciding when they complete

tasks—what they do and when they do it depends upon what the credit union member asks of them and strict regulations such as the Bank Secrecy Act. Therefore, increasing autonomy may be challenging. One opportunity to improve the motivating potential of the teller position is to address the lack of autonomy that is *perceived* by the tellers. The question presented by the data is: “What part of the teller’s position can be changed to increase the perceived autonomy without violating any of the overarching financial regulations?” One example may be to look for opportunities to give the teller more independence in other aspects of the workplace. It is common procedure to establish thresholds for check amounts. For example, if a check is written for an amount over an established threshold, the teller must acquire approval from their manager before depositing or cashing the check. Perhaps to increase autonomy, this threshold could be raised, thus decreasing the number of instances that tellers are required to acquire management approval. However, one might be concerned with giving an unexperienced teller too much autonomy too soon. After all, 87% of respondents in this study had been employed at the credit union as a teller for less than four years. To address this concern, perhaps the threshold for check approval could be increased after working as a teller at the credit union for three years.

Skill Variety

The core job dimension of skill variety involves the extent to which a teller has variety in the activities and skills they use in the workplace. The findings indicated that tellers expressed lower levels of skill variety than task identity and task significance. Leadership could improve the motivating potential of the teller position by addressing the deficiency of skill variety perceived by tellers. One suggestion would be for management to train or even cross-train experienced tellers to complete more services for members. In most credit unions, including the one in this study, tellers are responsible for quick, simple tasks on the teller line, while loan officers are responsible for longer, more complicated tasks with members. To help tellers experience more skill variety, perhaps tellers could have the opportunity to train and learn some of the responsibilities of loan officers. Not only could this possibly improve the motivating potential of the teller position, but

it could also help the credit union with efficiency at times when there is high demand for loan officers and low demand for tellers.

Feedback from the Job

Data also suggested that tellers experience a statistically lower level of feedback from the job than task significance. Currently, tellers' primary source of feedback is periodic, without any way to identify the member leaving feedback; therefore, it can be difficult for tellers to remember the interaction for which they received feedback. To increase tellers' feedback for the job itself, management could increase opportunities for tellers to receive evaluation or commentary about their work. Perhaps in addition to the anonymous method of feedback, members could also leave a voluntary, identifiable statement on a notecard immediately after being served. This way, the teller can identify the exact interaction that went beyond a member's expectations or that needed improvement. Another way management could increase tellers' feedback on the job is to give managers more time to be involved on the teller line. On many occasions, management can get caught up with other responsibilities and do not have time to observe tellers' work. If other responsibilities of the manager could be decreased, or if the importance of providing feedback to tellers could simply be emphasized, then perhaps the skill variety aspect of the motivating potential of the position could be increased.

Growth Satisfaction

The tellers also reported a lower level of growth satisfaction than security satisfaction. To increase the motivating potential of tellers, leadership could try to expand the number of challenges tellers face or choices that tellers have the authority to make, thus giving tellers more opportunities to grow in their jobs. As previously mentioned, tellers' duties fall within a small list, with little opportunity to utilize decision-making skills. By giving tellers additional opportunities to train and cross-train, tellers could face new, exciting challenges and exercise more independent thought and action in the workplace.

Leadership Through Mentoring Opportunities

One of the most important suggestions for credit union leadership stems from investing time and effort into mentoring young professionals. Mentoring opportunities provide numerous areas for individual growth as workers become exposed to different departments within the organization. Allowing high-potential tellers to work cross-functionally with the marketing, collections, internal compliance, or other departments would not only offer a frontline perspective into these traditionally segregated departments, but it would also allow tellers to understand where future career growth opportunities exist within the company. Strong, formal mentoring programs are known to have a mutually beneficial relationship.

For high-potential employees, credit union CEOs and the executive team should introduce formal executive mentoring programs. Exposing frontline employees to a small conference at which employees can hear directly from executive leadership about the challenges and opportunities the organization is facing creates a unique sense of cultural ownership in the younger employees.

Axelrod (2019) lists the following critical steps for creating a successful mentorship program:

- Step 1: Prepare for your role.
- Step 2: Establish the relationship.
- Step 3: Set the direction.
- Step 4: Leverage experience for development
- Step 5: Expand growth using everyday psychology.
- Step 6: Elevate the power of questions.
- Step 7: Diversify the development methods.
- Step 8: Promote influence skills.
- Step 9: Address mentor challenges.
- Step 10: Consolidate learning and bring closure.

By introducing Steps 2, 4, 5, 6, 7, and 8 into a formal, executive-based mentoring program, credit union leadership will specifically address the JDS opportunities of autonomy, skill variety, feedback from the job, and growth satisfaction. By enhancing the relationships between executives and their lower-level, yet high-

performing, employees, leaders will promote long-term, career-focused opportunities that younger employees will be excited to take part in. An old management philosophy that says, “People don’t quit jobs, they quit bosses.” Doing what we can to establish professional work relationships will not only benefit mentors and mentees, but it will also benefit membership through augmented and sustained customer service.

Conclusion

At most financial institutions, the teller position is an entry-level position ripe for cultivating an organization’s future leaders and executives. Tellers serve at the forefront of the organization. They are the daily embodiment of the organizational values to the membership. Understanding how the teller position is designed is key to understanding opportunities that should be addressed to increase the motivation and satisfaction of these younger employees. This study’s purpose was to acquire a better understanding of the motivating potential of this entry-level position and the opportunities that leadership could create to reduce turnover, increase member satisfaction, and invest in its growing workforce.

The study found that the tellers’ self-reported level of job satisfaction was significantly affected by their MPS (which averaged 130, on the lower end of the moderate category). While the data suggested that the tellers are moderately satisfied with their work, there were significant differences found between some of the core job dimensions and two types of specific satisfactions. To address these differences, suggestions were made for credit union leadership to examine more closely the JDS opportunities of autonomy, skill variety, feedback from the job, and growth satisfaction.

The study of job motivation and satisfaction is nothing new to leadership researchers. This study attempted to expand the JDS research into a new core job category—the teller position. As mentioned in the introduction, credit union CEOs recognize that being able to maintain their young workers creates long-term benefits for its membership, its employees, and the organization itself. For an industry that continued to not only maintain, but rather *increase* its employment

during a global pandemic, it's clear that the vitality of its workforce is imperative to the organization's long-term success.

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PEDAGOGY

Mini-Case: Carlotta Long and the Broad Street Counseling Center*

Joseph C. Santora
International Leadership Journal

This case allows users to focus on the multiple challenges facing Dr. Carlotta Long, the founder, owner, and manager of a counseling center, in coaching 10 part-time counseling staff during the COVID-19 pandemic. As the leader and manager of the counseling center, Dr. Long must decide on the best coaching strategies for her staff for them to deliver the most effective professional counseling services to current and new clients, despite their varied professional backgrounds, work experiences, and individual levels of counseling skills and abilities.

Key words: coaching, counseling, COVID-19, management strategies, supervision

Learning Objectives

- Define coaching staff in the context of a professional counseling center.
- Explore the coaching challenges facing a founder/owner/manager of a counseling center in a volatile, uncertain, complex, and ambiguous (VUCA) environment.
- Identify and select various coaching models for possible application in a remote workplace setting.
- Assess the adaption of various coaching strategies for inexperienced and experienced professional staff working in remote work environments.

Case**

Dr. Carlotta Long, a Licensed Professional Counselor and the founder, owner, and manager of the Broad Street Counseling Center, was deep in thought. She was very troubled about how to meet the complex and multiple challenges of coaching her loose-knit, part-time, independent, professional child, adult, and family counselors in a volatile, uncertain, complex, and ambiguous (VUCA) environment. Under normal circumstances in her capacity as the founder, owner, and manager of the counseling center, she wore multiple business and organizational hats, so

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**NB: This case has been made available through the cooperation of the organization and its principals. The names and places have been disguised to protect their integrity and anonymity. The case was developed solely as a basis for discussion. Cases are not intended to serve as illustrations of effective or ineffective management.

she was used to the various challenges that accompanied issues such as the coordination and scheduling of her staff of 10 part-time counselors. Scheduling staff and booking client appointments had already become a problem for her, but the effects of the COVID-19 pandemic and its permutations made administrative and managerial challenges even more complicated. Mandatory office closings by government agencies; an unprecedented increase in demand for counseling services caused by extreme anxiety levels, and personal and family-related depression issues; the inability, at times, to offer in-person individual and group counseling sessions to clients in a professional office setting; and privacy and security issues all added significantly to her managerial and business concerns.

Dr. Long knew she had to resolve these and other pressing business and counseling-related issues now, if her business was to survive, and if her counselors were to provide the best possible levels of service (LOS) for their clients in an extraordinarily difficult and stressful working environment. How would she manage these issues? And perhaps more importantly, how would she coach her counseling staff remotely?

Dr. Long's mind quickly shifted in many different directions as she sought reasonable short- and longer-term answers for developing innovative coaching strategies for her counseling staff, but several key questions kept nagging at her. For example, what existing coaching models could she adopt or adapt that would furnish her with the most effective ways to coach her staff remotely? How effective would these coaching models be, given the unique and distinctive blend of her counselors? One question begged another question—the list seemed almost endless. Only the ping of her cell phone reminded Dr. Long that her first remote counseling session of the day was about to begin in five minutes, and she had not yet activated her Zoom link to begin her session with her client.

Carlotta Long

Carlotta Long had been working in various private counseling centers and in larger, public-sector professional settings for about 20 years, acquiring extensive counseling experience with a diverse range of clients—from young adults to couples to families. She had been highly effective and successful Licensed

Professional Counselor, and she had also gained significant experience as a counseling supervisor and as a senior-level manager, which taught her the “business side” of the counseling industry, all of which fit neatly into her personal and professional goals to open a counseling center whose practice specialized in addressing child, adult, and family counseling issues.

When Long turned 40, she returned to graduate school to fulfill her lifetime ambition to pursue a doctorate in counseling. A few years later, with her new doctoral degree in hand, Dr. Long, who considered herself a builder of people and organizations, opened a private counseling practice in a three-room suite in a small professional office building. Five years later, she opened a larger counseling center in a nearby town. She slowly began hiring inexperienced and experienced counselors to grow her new counseling business.

By early 2020, Dr. Long had a very thriving counseling practice and employed 10 independent, part-time, licensed female counselors to deliver counseling services to children, adults, and families. These counselors ranged in age, experience, and education: from 28 to 80 years old (with an average age of 48 to 50 years old), with a variety of professional counseling experiences—younger, newly minted counselors possessed very limited experience, while older counselors possessed anywhere from 15 to 20 years of experience. The counselors’ educational backgrounds were as diverse as their demographic and work experiences. For example, one counselor held a PhD in Counseling, two held Master of Social Work (MSW) degrees and were Licensed Clinical Social Workers (LCSW), and three held Master of Arts (MA) in Mental Health Counseling degrees; all were Licensed Clinical Professional Counselors (LCPC). The other four counselors held MA in Mental Health Counseling degrees with designations as Licensed Associate Counselors (LAC). LACs may deliver individual and group counseling, counseling interventions, appraisal and assessment, consulting, and referral and research activities, but they need to work under the direct supervision of a qualified supervisor and complete between 3,000 and 4,500 hours of supervised experience under a board-approved supervisor, depending on educational levels and post-master’s experiences).

Staff Challenges and COVID-19

The COVID-19 pandemic and its various permutations have caused several major upheavals in the lives of most people throughout the world during the last few years. This unprecedented pandemic has had a major effect on most professions. The pandemic has also had a major impact on the mental health care profession and has resulted in radical changes in the supervision of mental health professional staff and the delivery of counseling services. For example, to reduce the spread of COVID-19, many private counseling centers have been forced to continuously modify their service-delivery strategies (e.g., office closures, reduced LOS, and hybrid [partial in-person/online] approaches to counseling sessions using various online technological platforms). Professional counseling sessions—individual and other counseling sessions—to children, adults, and families in need of mental health counseling services have been traditionally held in private office settings between an individual counselor and patients in 50-minute sessions. Follow-up and/or multiple counseling sessions have traditionally been scheduled with a counselor, depending on the acute or chronic nature of the mental health issue. In addition, Dr. Long had been encountering multiple coaching challenges with her professional counseling staff that had become increasingly difficult, if not impossible, to manage at a distance. Part of the problem was connected to the highly independent nature of professional counselors. For example, many counselors were unwilling to accept any constructive criticism about alternative approaches to delivering counseling services to clients. At times, counselors have adopted the “I am smartest person in the room” philosophy. Moreover, some professional counselors are only comfortable with providing services to certain types of clients (e.g., children, single adults, or married couples) and, as a result, these counselors presented Dr. Long with client scheduling and other managerial problems. She and her counselors were also highly concerned with any potential client confidentiality and cybersecurity issues.

Some Further Complications

Working remotely has presented a variety of challenges for business managers and leaders. In the counseling business, it has been the inability to “read” a client’s

body language via technology or to ask clients sensitive probing questions that may be overheard by other people present in a household or in a traditional office setting. For Dr. Long, it was her inability to schedule her weekly peer counseling meetings with her staff, including newly hired counselors who required some “hand-holding,” and to find some innovative ways to effectively supervise both new and experienced counselors individually and in small-group and large-group settings. She also needed to formulate a strategy to manage her diverse counseling staff to assign experienced counselors to help provide the proper guidance to inexperienced LACs to help them attain their LPC licensures. In essence, she wondered: How could she replicate what she did in person online?

Conclusion

As Dr. Long was preparing for her first client counseling session, she was preoccupied with the impact COVID-19, its variants, and the ever-changing government pandemic regulations were having on her counseling business and counselors. She also pondered what would happen once the COVID-19 pandemic ended. What workplace protocols now in use would be part of the “new normal” for her counseling business? For example, should she offer her counseling clients various counseling options: traditional face-to-face, hybrid, or strictly online services? Moreover, what lessons had she learned about coaching her professional staff during these last few years? To what degree were her new COVID-related business strategies successful? To what degree did experienced and less-experienced licensed counselors share new, valuable coaching techniques between and among themselves? Would these coaching approaches continue post-pandemic and become integrated into her practice? As she waited for her next patient to appear on Zoom, these and other questions weighed heavily on her mind.

Discussion Questions

1. What is going on in this mini-case? Provide a brief summary.
2. Put yourself in Carlotta Long’s position as the founder, owner, and

manager of the counseling center. Discuss the multiple coaching challenges she currently faces with her counselors. What do you think she needs to do to meet and overcome those challenges?

3. What are some coaching models Dr. Long might consider using to overcome her business challenges? Which model(s) might be most/least effective? Why?
4. Speculate: Do you think Dr. Long will be successful using those coaching models? What possible obstacles might prevent her from being successful?

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VIEWPOINTS

Family Business Leadership Dilemmas When Passing on Wealth *

Peter Lorange**

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Passing on wealth from the one generation to the next is critical. This “rite of passage” may represent motivation for many to accumulate wealth that might be passed on through hard work, prudent lifestyle, and discipline. Family firms generally depend on wealth creation and wealth preservation to function well. However, why is this process often so difficult? Why do such transfers of wealth frequently lead to conflict within families, often deep and disruptive? Some may feel treated unfairly, while others might believe that they have won the lottery when emotions arise in these situations.

I have experienced both sides of this. On the negative side, as I see it, I gave up my right to take over a valuable farm in the vicinity of Oslo, Norway, so that my sisters, cousins, and I might inherit this asset in equal shares, only to have one cousin attempt to gain at the expense of the rest of us. On the positive side, I unexpectedly inherited about half of a small shipping company from one of my mother’s cousins in 1988, which became the foundation for S. Ugelstad Invest, a successful investment company that I built up for my family. I was the sole owner until Fall 2021, when I transferred the ownership to my children in equal shares. I am now attempting to find a way to preserve my art collection for the future and am experiencing slightly lukewarm reactions from my children to such options as donating the collection to a museum or establishing a trust or foundation to own or manage it for years to come.

So both positive and negative emotions may emerge when assets change hands from generation to generation. One such instance, which prompted me to write this

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article, recently took place in North America, where the deceased owner of a relatively large family business had specified in his will that the bulk of his assets should be taken over by his girlfriend and not by his children. The children were up in arms, to say the least! It appears that a main issue in this succession crisis was that the children had not shown much interest in the family business.

Uneven Distribution of Inheritance

Why has inheritance sometimes been distributed unevenly among inheritors? From a legal perspective, there are, above all, two such cases.

- There is a long tradition of passing agriculture on to one member of the next generation without splitting it up to allow for the maintenance of sufficiently large farms or to allow them to continue to be economically viable. This preferential way of inheritance when it comes to agricultural proportions is law in many countries and has a very long tradition in most civil societies.
- There has also been a certain entitlement of men (men being historically more privileged in terms of asset distribution) relative to women in many societies, but this bias is becoming less accepted today. The law has been changed to ameliorate such biases in many places, but it still remains as before in some societies.

There are at least three other traditions for distributing inheritance in uneven ways, generally set out in the last will of a deceased person.

- There may be reasons for passing on a business activity in an intact manner. In some cases, it may be difficult to impossible to split a particular asset, such as a physical plant or store. There may also be instances where the maintenance of some critical size might be critical. Many family businesses fall into this category. It should be noted that it shall always be relatively easier to redistribute ownership in equal parts when it comes to family-owned investment firms. This was indeed my experience when I transferred the ownership of my investment company to my two children in equal parts.

- Owners might also consider some members of the next generation to be more suited to run the business after he or she is deceased. This might have been the case when I inherited half of the shipping company I previously mentioned; even though the former owner had nephews, they did not have a shipping background.
- In some cases, a deceased person might have had preferences with respect to whom might be taking over. He or she might have had favorites. Even when it comes to transfer of ownership to those other than family members, this may be an issue of likes or dislikes that the deceased might have had. In some cases, it might even be an issue of the next generation being deemed to be too old to meaningfully take over. A grandchild might be designated instead. These types of situations always tend to be more contentious in cases where members of the next generation have been involved in a business, perhaps even having intimately worked with the deceased. When the next generation has been fairly inactive, then it might be relatively easier to distribute an inheritance unevenly.

There may also be a “special circumstance” if a former owner (old generation) might have had a suspicion that the expected heirs from the next generation might sell what they inherit, i.e., to cash in and thus enjoy a windfall gain. Members of the next generation may have entirely different interests when it comes to what they inherit. They may, for instance, have careers that may be incompatible with being involved in the inherited business. Also, there may be so many members of the next generation that it may be difficult for one or a few to realistically “buy out” the others. A former owner may have considered these situations when writing his or her last will. This might have been the case when the businessperson referred to earlier specified in his last will that his female companion should inherit his business, rather than his disinterested children.

These factors that might justify uneven redistribution of inheritance do, however, seem to be on the wane. In today’s age, there seems to be a growing tendency to split inheritance evenly among those who are the next generation, with a growing emphasis on fairness when it comes to redistribution. This might pertain to a now

widely “democratic” practice when privileges for a few no longer exist. An equal split might be thought to be “right,” more and more. It might be part of the strong shift toward equality, thus no longer making it normal or easy to discriminate against female inheritors.

In total, there seems to be a clear trend toward equal redistribution of inherited wealth among the members of the next generation. I am personally elated to see this shift. I expect this to become a stronger reality in the future, with less preferential treatment toward some at the expense of others. But what else might be done to make the process of transfer of assets more harmonious? I have the following recommendations:

- *Behavior:* The first recommendation is strictly behavioral. It basically indicates that all members of the older generation (husbands as well as wives) should treat all the members of the next generation in the same way, always fair, and never favoring some over others.
- *Governance:* The second recommendation calls for putting in place good governance processes, so that all members of the next generation might participate alongside the members of the older generation. Perhaps the next critical potential result from this might be mentoring, i.e., a good way for the older generations to bring in the next generation in such a way that critical business insights and experiences can be transferred to the new cadre, during their own management of the family firm and within a specific framework of checks and balances and administration.
- *Involvement and engagement:* The third suggestion would be for the older generation to gradually involve the next generation, so that they can develop their experience in such ways that not only important insights might be transferred, but also, perhaps even more critically, that the younger generation might develop a stronger commitment to the business, a more “vibrant” interest! Regrettably, it might be hard for members of the older generation to let go. It is, therefore, often meaningful to carve out specific new business areas where the next generation might be active. The key

issues here do, of course, have many parallels to the one just previously raised: competence building and commitment.

There is one additional overriding positive effect from these suggestions. In addition to increasing competence and enhancing business motivation, namely, it should instill a sense of collaboration as the overriding driver of the next generation, i.e., “we, we, we,” rather than “me, me, me.” This togetherness with the next generation group is often critical to securing the probability of achieving maximum business success.

It is, of course, the ownership side that should be held together in this way. Some members of the next generation might end up being more active than others, but in governance, they would all be together. This must be driven by full transparency so that all members of the next generation might satisfy themselves that the smaller group is doing an adequate job. There should be no excess benefit to those few! It may be useful to distinguish between key management functions versus holding an ownership position when it comes to this. Explicit governance systems and procedures are essential. Developing a healthy ownership culture, such as the one described above, is key. Thoughtless approaches to transferring values can regrettably do major damage. Inheritance is a lot about developing a strong continuation of business focus.

This is, of course, not a concern confined to the older, outgoing generation. The next generation should also have legitimate views. I have not raised such issues to a large degree in this essay, remaining largely focused on the outgoing owner and his or her last will. Transfer of ownership may be less dysfunctional when a “stewardship” focus is established, rather than owning in a dominating way. In this respect, it would again be critical to know the extent to which the deceased former owner in the case mentioned previously might have attempted to develop such stewardship culture, and thus also the extent to which his children might have contributed to this.

Conclusion

On one hand, the process of inheritance is of key importance, contributing at times to the actual strengthening of workable ties among next-generation family members, but, regrettably, often leading to the opposite—dissonance. To some extent, as we have seen, there are some longstanding traditions and principles set in law that might enhance such dysfunctional developments. Further, there might be specific wishes, indicated in last wills, that might enhance such centrifugal effects.

On the other hand, as we have seen, recent practices of inheritance tend to go more and more the other way, based on the enhancement of a principle of “all being treated equally.” Inheritance might thus lead to less dysfunctions than previously was the case.

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Millennial CEOs Are Taking Over the Corporate Stage. What Can We Expect From the Show?*

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The Millennial Generation continues to incite divided debate when it comes to their aptitudes, foibles, aspirations, and leadership expectations. However, as this generation takes on CEO positions, its performance as leaders has yet to be researched extensively (Grotkamp et al., 2020; Valenti, 2019). Therefore, we draw on previous research (e.g., Bhalla, 2019; Toader & Howe, 2021) to make robust deductions about their potential attributes and limitations in CEO roles. Underpinning these inferences is the recognition that millennials have redefined leadership (Folarin, 2021). Millennial leaders are keen agents for change and innovation in their organizations, prioritizing an inclusive approach focused on people development as well as “soft” concerns of well-being over financial reward (Andert et al., 2019; Gerard, 2019; PwC, 2021). Yet, how these preferences manifest themselves must be evaluated to prepare millennials for their roles as CEOs.

Key words: millennial, millennial CEO, generations, leadership, succession planning

As practitioners and leaders, we observed and influenced the professional evolution of many millennials (individuals born between 1981 and 1996) in large organizations and in small, medium-sized enterprises (SMEs). The controversies and attention surrounding this (Grotkamp et al., 2020; Valenti, 2019) led us to conduct research on the unconventional workplace behavior and expectations and professional evolution of millennials. This viewpoint piece is based on extensive literature reviews, using our own work as a starting point to explore millennial leadership and millennial CEOs. Our experience, confirmed by the literature in the field, revealed one question that surfaced repeatedly about this generation; how would the millennial mindset, preferences, and ethics affect millennial CEO leadership performance (Espinoza & Schwartzbart, 2016; Karriker & Hartman, 2019)?

Before we can address any promising leadership features of and potential areas of concern for the millennial CEO, we must accept the basic premise that the millennial desire for well-being takes precedence over salary (PwC, 2021), which has initiated a rethinking their ambitions. Millennial burnout has been well

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documented. It has also contributed to their fresh approach to professional choices (Petersen, 2019). In fact, do millennials even want to become CEOs?

Three Promising Features of the Millennial CEO

Although millennial CEOs share many characteristics with previous generations, research has found they share three specific attributes: (a) they are keen agents for change and innovation, (b) they are relentlessly focused on supporting people, and (c) they use an inclusive, collaborative leadership style (Andert et al., 2019; Gerard, 2019, PwC, 2021).

Champions of Change and Innovation

Millennials leaders actively embrace change, challenge assumptions, and create a stimulating environment in which their followers can manifest their creativity and develop new ideas (Toader & Howe, 2021). At the same time, their enthusiasm, combined with technological competence, has contributed to an accelerated rhythm of technology innovation and adaptation even prior to the pandemic lockdown (Gong et al., 2018). Millennials adopted technology as teenagers and/or young adults, leading to global virtual connections and an inevitable embracing of technology in their leadership, such as new communication channels and instant feedback electronic tools. Millennials advocate technology that could result in flatter and more flexible organizations that are able to respond to corporate challenges with more agility.

Mentors Not Managers

Millennial leaders support followers by paying attention to their individual needs and developing their strengths through coaching/mentoring, empowerment, and active listening. “Teaching people how to fish,” “helping others grow,” and “finding solutions together” are all common declarations millennial leaders use when talking with their followers. Millennial leaders effectively empower followers by developing and motivating them to ensure alignment with organizational objectives. Active listening is a key millennial leadership trait that helps develop an esprit de corps among team members (Toader & Howe, 2021).

Promoters of an Inclusive Agenda

Millennial leaders perceive themselves as inclusive, participative, adaptable, open to the opinions of others, transparent, and honest; they try to help and also to encourage employee involvement through common beliefs rather than force (Toader & Howe, 2021). They were raised in a more inclusive and collaborative environment and were taught to collaborate on projects and to work in teams. (Gong et al., 2018). They transferred these traits to their professional lives and increasingly expect leaders to create a culture of diversity, inclusion, and equity and consistently demonstrate a concern for positive social impact (Deloitte, 2019).

Three Challenges for Millennial CEOs to Overcome

The agility of millennials to make disruptive change has been admired; however, research suggests that millennials actually (a) lack adaptability (despite their perception to the contrary), (b) are not comfortable giving or receiving critical feedback and (c) display an absence of understanding and empathy for others (Bhalla, 2019).

Learning to Adapt to Long-Term Focus

Millennials show a tendency for short-term focus (Rohrich & Rodriguez, 2020), leaving jobs for others if they do not feel fulfilled. This short-term focus is not conducive to the role of a CEO, whose strategies include long-term decision-making. The complexities, bureaucracy, and depth of rigor required within certain industries can clash with the agile and simpler, process-driven millennial approach. In many instances, a non-millennial approach may be more suitable; however, we are unsure whether this generation is malleable enough to adjust.

Providing Critical Feedback

Millennials are generally uncomfortable with critical feedback. Managers often resort to cushioning their criticism of millennial employees. Millennial CEOs will have to learn to accept uncensored feedback from their teams (Valenti, 2019), who are unlikely to offer moderation in their criticism. Millennial CEOs will also need to nurture their own humility to learn from the censure of their teams. Millennials' self-

confidence and sense of self-worth may need taming when they realize that there is no go-to person to rescue them, and that they alone are accountable for their decisions and subsequent outcomes.

Appreciating Multi-Generational Skills

Much attention has been paid to how Gen Xers and baby boomers manage millennials; however, research on millennials leading other generations (including Gen Z, who are in the very early stages of their careers) remains limited. The onus has been very much on other generations identifying and managing millennials' traits, but there is little evidence to show this has been reciprocated. A millennial leader's anxiety on how to keep teams happy and motivated, thus, comes as no surprise (Valenti, 2019). With five generations present in the workplace, generational conflict is widely recognized in organizations. As millennials take on leadership, it becomes their responsibility to manage these situations. Millennial CEOs will need to put aside prejudices about other generations to adopt a fairer approach that recognizes generational differences and utilizes the skills that different cohorts have to offer.

Conclusion

Millennial CEOs are "work-in-progress" leaders. Although they face some enormous challenges in today's complex world, these challenges have created unique opportunities for them to establish their influence on society and organizations. Millennial CEOs' inclusive leadership and management styles have already begun to change the "old" workplace. Despite these positive accomplishments, there are several areas that need to be addressed further if millennial CEOs are to succeed as the next generation of business leaders. For example, succession planning for millennial leaders is a major concern (Ballaro et al., 2021). Failure to recognize promising proficiencies as well as alarming shortcomings of the Millennial Generation will lead to organizations' inability to mold this next generation of CEOs. While there are studies that suggest millennial leaders are willing to participate in leadership actualization activities (e.g., Karriker & Hartman, 2019), we believe that uncertainty remains. We also believe that

millennials have transformed traditional approaches to work and leadership and will continue to do so (Folarin, 2021).

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