

**LEADING ORGANIZATIONAL DEVELOPMENT THROUGH
ACTING TEAM LEADER DEVELOPMENT**

By

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the requirements for the degree of

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In

LEADERSHIP AND TRAINING

We accept this thesis as conforming
to the required standard

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ABSTRACT

This research study inquired into what competencies are essential to acting team leader performance in federal government call centres and what interventions would support acting team leader development. Current literature on supervision points to the need for team leaders to have greater expertise in creating a positive work environment and leading change, but research specific to call centres is limited. A survey questionnaire was distributed to a large group of respondents. Employees from 6 occupational groups and 2 call centres were asked what competencies are essential to acting team leader performance. A focus group was used to inquire into what programs, interventions, and practices would support frontline leadership development. The most significant finding of the on-line survey is that respondents said all of the leadership competencies are important. The focus group findings supported the findings of the survey: The importance of a structured program, transparent selection and development processes, skills training in leadership competencies, feedback, and work experience.

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CHAPTER ONE: FOCUS AND FRAMING

Introduction

The Vancouver Call Centre is part of Department of Human Resources and Social Development (HRSD). The department was established in 2006, bringing together Human Resources and Skills Development Canada (HRDC) and Social Development Canada (SDC). The Vancouver Call Centre is a work environment in which the main business is conducted using a computer and telephone-based technologies that enables the efficient distribution of incoming calls to available staff.

The purpose of Vancouver Call Centre is to respond to client phone enquiries by providing detailed information to personal questions on Employment Insurance, Canada Pension Plan, Old Age Security, and Guaranteed Income Supplement. Telephone enquiry service has evolved over approximately 25 years. The Vancouver Call Centre, one of 22 in Canada, started in the early 1980s with just a handful of agents. Employment Insurance and Income Security Program, currently in the process of merging, were different departments until 1993 and different worksites until 2002. Through that decade, the increased use of computers has made it possible for agents to access client information and answer specific questions. The public liked the call centre service and with improvements in technology, the 1990's saw telephone service expand greatly. HRSD currently handles 50 million calls per year.

Developing acting team leader capacity at the Vancouver Call Centre has tremendous potential to improve the effective and efficient day-to-day operations and create a learning culture to support employee and organizational development.

For the purposes of this research project, a “team leader”, also referred to as a supervisor, is defined as someone who leads a team in the delivery of programs and services for an assigned

portfolio. “Acting” is defined as a temporary assignment of an employee, to the duties of a higher position, where the differences in pay are considered a promotion. The department has not kept track of how many acting team leaders become substantive team leaders. What has been noted by managers and human resource specialists is the large number of acting team leaders who are not successful in competing for substantive team leader positions.

My interest in this topic is a result of my experience of learning front-line supervision by the seat of my pants. In my former position as a learning coordinator, I specialized in leadership development and self-directed learning. The call centre implemented a successful acting team leader development program in the 1990s. However, recent efforts to explore acting team leader development did not move ahead because of time and operational workload pressures. The idea emerged again and gained momentum with the establishment of a working group in April 2005.

The Acting Team Leader Working Group has met bi-weekly, becoming a very cohesive group, and completed an outline for a training program. Group members brought valuable on-the-job experience and many have completed a public administration program at the University of Victoria as part of a management development initiative. The group played a central role in the conduct of the research project and generated the following research questions.

Question:

What behaviorally defined competencies are essential to acting team leader performance?

Sub-Question:

What interventions, programs or practices would support acting team leader development?

The answer to these questions are important because the public sector telephone enquiry service is being challenged to not only meet, but to exceed, private sector service. In an often

quoted document entitled “Citizen’s First,” Canadians want service that is “timely, fair and from staff who are knowledgeable, competent and courteous” (Treasury Board Secretariat, 1999). In response, the federal government adopted private sector technology and service standards to increase efficiency. In late 2005 the department launched Service Canada, a transformational initiative to provide Canadians with one-stop easy-to-access Government of Canada services and benefits in a single service delivery network. “Service Canada will integrate services from a number of federal departments to form a single service delivery network” (Service Canada, 2006). The initiative has a three year plan to implement its service vision. Developing effective leaders is key to this plan’s success.

The Vancouver Call Centre has a very flat organizational structure. The telephone centre includes 200 agents, 11 team leaders, five program advisors, three operations specialists, and two managers (one when the call centres are merged in 2006). The managers report to a Call Centre Director General - Call Centre Harmonization. The call centre recently became part of a national operation, losing some of its regional autonomy to support a Canada wide network. This has further limited spontaneous efforts to develop leaders on the job.

Organizational structure in and of itself necessitates some acting team leader development. With the merger of the call centres, all team leaders (and actors in their absence), will report to one manager. Team leaders and actors will therefore not have as easy access to managerial guidance and coaching as is currently available. Second, the flat organizational structure has created a large jump in responsibility from telephone agent (where the primary activity is to answer client enquiries) to team leader. The team leader must have strong interpersonal communication skills, be results oriented, communicate organizational priorities to achieve strategic priorities, report organizational functioning, and build relationships with

functional specialists and line staff. Therefore, there have not been enough intentional leadership development initiatives in place to adequately equip the leaders who need it in order to be prepared as leaders.

The Opportunity and its Significance

The complex, ever-changing and often turbulent landscape of the public sector requires, as Vicere and Fulmer (1996) asserted, "...processes for identifying and developing exceptional people capable of moving an organization into the twenty-first century" (p.135). In particular, public sector leaders must champion a new model of citizen-centered service delivery that meets a high standard of service and protects individual privacy (Treasury Board Secretariat, 1999). "Effective leaders don't have to be passionate or charming or brilliant. What they must be is clear – clarity is the essence of great leadership" (Breen, 2005, pp.65-67).

With the implementation of acting team leader development the call centres may experience an improvement in day-to-day operations and be better equipped to lead change initiatives. Staff relations issues, often based on a lack of knowledge in such matters as leave administration, health and safety, and conflict resolution, will hopefully be fewer, less frequent, and will be resolved more quickly.

The challenge will be to implement and sustain the training program in a culture that has an inconsistent and even intermittent approach to acting team leader development. In a recent national survey, call centre staff "expressed dissatisfaction with career mobility or advancement" and a lack of "access to training/ professional development" (NCCER, 2005). Time and workload pressures have kept aspiring acting team leaders from taking the time to pursue leadership development. Further, call centre management wants to support leader development, but actual practice confirms that acting team leaders are immersed in operational workload

pressure and do not have the energy, time or opportunity to plan and develop themselves as leaders (K. Jensen, personal communication, February 24, 2005).

Systems Analysis of the Opportunity

Senge's (1990), *The Fifth Discipline*, a classic in supporting systematic analysis, provides insight into the organizational challenges facing the Vancouver Call Centre. Senge's models, "Does your organization have a learning disability?" (pp.18-25) and "Prisoner of the system, or prisoners of our own thinking?" are applicable to challenges facing the call centre (pp. 51-54).

The espoused values of an organization with a learning disability include, "I am my position, the enemy is out there, the illusion of taking charge, the parable of the boiled frog and the myth of the management team" (pp.18-25). Such organizational learning disabilities could make it difficult for the call centre to embrace learning and establish leadership development. The theory of complex adaptive systems, while recognizing the constraints as described by Senge, encourages change agents to shape the organization through new relationships with other departments, ideas, and customers.

Senge's "Prisoners of the system, or prisoners of our own thinking," describes a culture where the system causes the crisis (Senge, 1990, pp. 18-25). This analysis is supported by Boleman and Deal's (2003) description of the structural and political organizational frames. The call centre can be characterized as maintaining the status quo and following a strict chain of command. The political frame requires that one know the rules of the game and fight for scarce resources.

The call centre seems to be suffering from what Schein (1999) describes as a loss of "functional familiarity" (p.108). The Vancouver Call Centre has doubled in size in the last five years and is now part of a national structure. This has resulted in a misunderstanding across

subcultures, loss of trust, and increased formal contracting. The organization has not been able to lead the change and maintain traditional values. To turn the call centre around and create a learning organization, Wheatley (1999) advises, “Change becomes much easier when we focus first on creating a meaning for the work that can embrace us all” (p. 149).

Organizational Context

The Vancouver Call Centre is part of a larger federal government service delivery network that is experiencing transformational change. In an often quoted document “Citizen’s First”, Canadians want service that is “timely, fair and, efficient service from staff that are knowledgeable, competent and courteous” (Treasury Board Secretariat, 1999).

The service delivery transformation started in 2003 with the Agenda for Renewal. Included in the Agenda for Renewal is a five year action plan, Modernizing Service for Canadians, the purpose of which is to ensure that HRSD policies, programs and services are developed and provided to Canadians in a better, more responsive and more efficient manner. “The department is modernizing service to better serve clients and to become the social face of the Government of Canada with Canadians” (HRDC, 2003a).

The department’s strategy to manage service delivery has been to centralize decision-making and to require standardization in operational and corporate activities. At the call centre level, the operational focus has changed from a regional client focus based in Victoria and Vancouver to a national citizen focus centered in Ottawa. Citizen, business expectations, and demographic pressures are driving the imperative for change.

The Modernizing Service for Canadians is the corporate strategy directing “Call Centre Harmonization (CCH)”. The purpose and objectives of CCH are being driven by the use of the telephone as the primary channel for interfacing with government for the provision of

information and the transactions associated with services. The Treasury Board Secretariat is looking to HRSD and the Service Canada initiative to provide a leadership role in the delivery of government services to Canadians.

To achieve performance optimization, a national plan called Enterprise-Wide Management, has been established. The plan has been established to create an organizational structure, reporting relationships, and standardized processes and procedures, “to support consistency in the caller experience and make the best of possible use of resources and tools” (HRDC, 2003b). A quality assurance program with a single organization wide definition of quality and approach to measuring, achieving, and reporting on quality targets and benchmarking will be implemented.

Starting in 2004 the structure and reporting relationships changed from a regional to a national focus. A Call Centre Director General was established to lead the new branch and a Senior Director of Call Centre Operations was also created. The Senior Director is responsible for the day to day management of the Network. The Vancouver managers report to the Senior Director (HRDC, 2003c).

To support standardized processes and procedures, objectives for networking the call centres was established. The first goal of the networking is to “provide better service to Canadians, through more reliable, timely, responsive effective and efficient telephone service delivery” (HRDC, 2003b). The second goal is to build a skilled workforce. A new performance management tool and the two quality assurance positions have been introduced to support employee development. The third goal is to build a multi-channel service platform that will involve telephone, internet, mail, and in-person channels.

The second goal, as described above, is the one that will have a significant impact on the work of acting team leaders. Currently, actors work with the operations specialist to ensure service levels are maintained in day-to-day operations but have had little involvement in leading change and managing performance (HRDC, 2003d). Actors will be called on to communicate performance expectations, coach staff to improve performance, and meet quality targets.

The Vancouver Call Centre, as part of a larger federal government organization, has access to extensive and comprehensive human resource management resources. Human Resources and Social Development supports continuous learning where the responsibility for learning is shared by managers and employees. The department introduced a competency based approach throughout its operations in the 1990s. This framework includes core, group, task, and leadership competencies. In addition, *The Leadership Network* a federal Human Resource Management Agency website that is accessible to the public provides a leadership competency framework for six levels of management. This framework includes values and ethics, strategic thinking, engagement, and management excellence. These broad categories of competence are a start, but do not define the behaviours that actors must engage in if they are to be successful.

In the last few years the demands for acting team leaders has gone from what used to be described as babysitting to increasing operational demands that meet nationally dictated service levels and communicate change initiatives to staff. As aspiring leaders, actors must step-up to a challenging and tightly controlled operation. This study will help to further define the behavioural competencies that actors must internalize to meet this challenge.

CHAPTER TWO: LITERATURE REVIEW

My research questions explored the topic of leadership development within the context of a federal government call centre. To help frame this research project a review of the literature examined three topics, including organizational culture, competency development, and leadership development. Organizational culture is explored from several perspectives, including formal organizations, the leader's role, the dynamic of trust, and organizational change. Leadership development and competency development are presented to inform the learning and development aspect of this project. Viewing this from a systems perspective, these topics interact and interrelate, often in an ambiguous manner, and do not enjoy any clearly defined linear causal relationship (Aronson, 1996).

Organizational Culture

This review of organizational culture literature will focus on four subject areas. The first subject, formal organizations, will look at the role of management and control, employee behavior in formal organizations, formal organizations in the future, and a particular type of formal organization, the call centre. The second subject, leaders and organizational culture, will define organizational culture, and compare and contrast several perspectives on the leader's role in organizational culture. Organizational culture and trust is the third subject that will be examined. The fourth and final subject, organizational change, will include a discussion of several theories of organizational change, and the importance of employee empowerment and employee involvement.

Formal Organizations

A discussion of the concept of formal organizations must start with a review of the current literature. The literature describes three broad categories of organizations; rational,

organic, and open systems (Scott, 1992). The rational system, also described as the mechanistic model, typified by Weber's bureaucracy, was designed for the efficient realization of ends. To function effectively it requires disciplined performance of participants, specified goals and formalized rules and roles (Scott, 1992). While the rational organization has many positive attributes, Bennis asserts that there is too much focus on structure and has described the mechanistic model as "organizations without people" (as cited in Scott, 1992, p. 49). The rational organizations best typifies the government structure. In contrast, organizations as natural systems, an organic model, are internally fluid and are shaped by individual's activities and attitudes. The third model, the organization as an open system, the organization has a dynamic relationship with the external environment.

The Role of Management and Control

The mechanistic model is often characterized by its maladapted hierarchical structure. "The focus on rules, commitment to centralization, and emphasis on enforcement spawned worrisome consequences, which have tended to make bureaucracy a pejorative rather than a descriptive term" (Barzelay, 1992, p. 124). However, strictly bureaucratic organizations are being challenged to adapt. Scott (1992) argues that because organizations are becoming more complex and uncertain over time, "...other processes – routinization, standardization, the creation of rationalized myths – create new islands of certainty" (p. 149). Human Resources and Social Development's Service Canada initiative has adopted practices to provide standardized service across Canada using three service channels: the internet, telephone and in-person.

Employee Behaviour in Formal Organizations

With the mechanistic approach, employee behavior is influenced by the hierarchy, segmentation and rule orientation of formal organizations. In an early study of formal

organizations, Warwick (1974) described the dominant organizational behavior as “Minimal compliance with performance standards; no risk taking; and strong pressure for additional rules to cover ambiguous situations” (p. 103). Risk aversion is further compounded by a promotional system where no one wants to make a mistake. The result is an increased demand for “hierarchy and rules to signal correct behavior” (p. 111). Groups often adopt “utilitarian practices” to abide by whatever rules are essential and then develop countercultural norms, for example, taking longer coffee breaks to create a sense of equity (Schien, 2004, p. 191). Oshry (1995) used the metaphor “tops, middles and bottoms” to describe the differentiated and conflictual relationships between employee components (p. 137).

In the formal organization the team leader role often creates unnecessary employee dependence and peer rivalry. Work segmentation increases the need for the leader to coordinate the activity among the parts in order to maintain the whole. This need for the leader, in turn, increases the subordinates’ degree of dependence and subordination. This creates a circular process whose impact is to maintain and/or increase the degree of dependence and subordination. This amplifies the rivalry and competition for the leader’s favor (Warwick, 1974). Eagerness for promotion to limited positions creates further peer rivalry and hostility (Argyris, 1974).

To further challenge the effective functioning of the formal organization, during times of uncertainty “groups tend to revert to one of three styles of operation that employs different kinds of defense mechanisms against anxiety: dependency, pairing, or fight-flight” (Morgan, 1998, p. 196). Call centre team leaders describe a type of dependency that involves “an excuse for personal inaction” on the part of the agent (pp. 196-197). Like dependency, pairing “paralyzes the group from taking action... (as) a messiah figure will emerge to deliver the group from its fear and anxiety” (p. 197). Fight –flight involves identifying an enemy, in this case the other call

centre, and “This enemy embodies the unconscious persecutory anxiety experienced by the group” (p.197).

The Future: A Post Bureaucratic Perspective

The classic bureaucracy has evolved from what Bennis described as “organizations without people” (as cited in Scott, 1992, p. 49) to what Barzelay describes as a ‘post bureaucratic perspective’ in which “the central challenge ... is to channel human energies into thinking about and doing socially responsible work” (p. 125). Commenting specifically on government organizations, Barzelay states the focus should be on “gaining support for norms” and finding ways to make citizen-centered decisions (p. 127).

Call Centres

The next section of this literature review describes a particular type of formal organization, the call centre, and presents information to describe the context of frontline supervision in this type of operation.

A call centre, a type of formal organizations, is defined as a work environment in which the main business is mediated by computer and telephone-based technologies that enable the efficient distribution of incoming calls to available staff. This permits customer-employee interaction to occur simultaneously with the use of display screen and equipment and the instant access to, and inputting of, information (Holman, 2003).

Organizations thus benefit from call centres in two main ways. Call centres have reduced the costs of existing functions and have extended and improved customer service facilities.

However, the benefits for call centre employees are less clear (Holman 2003; Deal & Kennedy, 1999). Extensive recent research into call centres has shown that lack of control, role stress, performance monitoring, inadequate coaching and training, emotional labour, and lack of

team leader support can lead to job stress – including depression, emotional exhaustion, and anxiety (Bakker, Demerouti & Schaufeli, 2003; Holman, 2003; Zapf, Isic, Bechtoldt & Blau, 2003).

Recent research at a large Dutch call centre using the employee well-being framework - the job demands-resource model, found that in order to reduce or prevent exhaustion, and the risk of repetitive stress injury, and consequently absenteeism, specific job demands (work overload, emotional demand, and computer problems) should be reduced or optimized. In addition, in order to increase involvement and lower turnover intentions, the availability of job resources (social support, supervisor coaching, time control, and performance feedback) should be considered (Bakker, Demerouti & Schaufeli, 2003). A United Kingdom study found six job and organizational factors provided a positive effect on employee well being. The factors are: control over methods and procedures, what is said to customers, task variety, a performance monitoring system that is not too intense and is focused on development, progressive human resource practice, and a supportive team leader (Holman, 2003).

Leaders and Organizational Culture

This section of the literature review will examine the leader's role in leading change within the context of organizational culture. Schein states, "...the biggest danger that you face is that you do not fully appreciate the depth and power of culture" (Schein, 1999, p. 185).

Acknowledging the depth and power of culture, the researcher focused her review on the leader's role in a "midlife" organization, undergoing restructuring and a merger.

Defining Organizational Culture

Organizational culture is "a pattern of shared basic assumptions that was learned by a group as it solved its problem of external adaptation and internal integration, that has worked

well enough to be considered valid and, therefore, to be taught to the members as the correct way to perceive, think, and feel in relation to those problems” (Schein, 2004, p.17). Solomon and Flores (2001) define culture in similar terms: “The collective results of such conversations, negotiations, and commitments in the ongoing dynamic that we call ‘culture’ and, on a larger scale, ‘civilization’” (p.49).

Organizational culture can also be described based on the maturity of the characteristics of the culture. Schein described three stages of organization culture, starting with founding and early growth, then midlife, and finally, maturity and decline. The call centres, having been existence for approximately 20 years have many of the characteristics of a midlife organizational culture. The midlife organization is often characterized by the diversity of its subcultures (Schein, 2004). People naturally form subcultures as a result of “interdependence, shared experience and the need for collective sense making” (Bolman & Deal, 2003, p.176-77).

The Role of the Leader in Organizational Culture

In examining the role of leaders in organizational culture, current literature asks, are leaders responsible for creating culture, managing it, or simply adapting to it? Quinn (1996) contends that a workplace or organizational culture is something that evolves naturally and is not designed; furthermore, “At any given time, the culture will facilitate certain desired outcomes and block others” (p. 99). Schein (1993) contends that one of the important functions of leadership is to address and act on “maladapted elements” of culture in order to preserve the survival of the group. “It is in this sense that leadership and culture are conceptually intertwined” (p.5). Leaders should “... support and encourage those cultural forms that help to dissipate cultural strains” and chose those that “inspire commitment from members but are sufficiently general so that they remain relevant as circumstances change (Trice & Beyer, 1993, p.388).

The role of the leader in merging organizational cultures requires the ability to build relationships and take action as employees of merging organizations often feel “plundered, exploited, and occupied. They frequently react with anxiety, paranoia, and hostility toward the acquiring firm” (Trice & Beyer, 1993, p. 245). To successfully facilitate the process, Schein (1999) states “It is essential that leaders recognize that such cultural alignment requires not only cultural humility on the leader’s part, but skills in bringing different subcultures together into the kind of dialogue that will maintain mutual respect and create coordinated action” to help the organization evolve into whatever will make it most effective in the future (2004, p. 289). Morgan’s ‘democratic’ leader is “...subtle and symbolic” when leading the merger of two cultures (1998, p. 171). Morgan asserts that the democratic leader is characterized by spending “...time listening, summarizing, integrating, and guiding what is being said, making key interventions and summoning images, idea, and values that help those involved to make sense of the situation with which they are dealing. In managing the meanings and interpretations assigned to a situation, the leader in effect wields a form of symbolic power that exerts a decisive influence on how people perceive their realities and hence on the way they act” (1998, p. 171). Quinn’s (2004) purpose centered leader is internally driven, other-focused, and externally open.

Several researchers have examined the team leader role in call centers and found that frontline supervisory effectiveness requires conceptual, technical, and interpersonal skills. Agents look to their team leaders as a bridge between the frontline operations and senior management to explain and make sense of the continuously changing nature of the call centre (Armistead, Keily, Hole & Precott 2002). Technical skills are also important, as agents have stated that team leaders who have worked their way up “understand the realities of handling time pressure and the tightly controlled nature of the work” (p. 253).

Team leader interpersonal skills; include coaching, group leadership, developmental feedback, empowerment, identifying task variety, debriefing emotional dissonance, and communicating organizational resources to support agents (Holman 2003). Current best practices include building trusting relationships, mentoring and supporting social networks (Cheriniss & Goleman, 2001). To support employee development and organizational commitment Buckingham (2005) asserts that team leaders should know “employee strengths, and how to activate these strengths, and how individuals learn” (pp.70-79).

Organizational Culture and Trust

This examination of organizational culture and trust will describe the importance of trust during times of change, examine hierarchical organizations and trust, and explain what organizations can do to improve trust. This discussion will shed light on the importance of trust during times of change.

During times of organizational turmoil, the importance of trust is elevated. Trust has been defined as “...one party’s willingness to be vulnerable to another party based on the belief that the latter party is (a) competent, (b) open, (c) concerned, and (d) reliable (Mishra, as cited in Kramer & Tyler, p. 265). “Few other conditions offer so great an opportunity to enhance trust” and contrarily destroy it by acts of non performance being seen as “acts of complete betrayal” (Webb, as cited in Kramer & Tyler, p. 293). On an individual basis, truth and justice positively influence an employee in their assessment of the impact of the threat, and empowerment increases the belief that they will be able to cope (Mishra & Spreitzer, 1998).

The dynamic of trust as a posited by Solomon and Flores (2001), relates to culture through the notion of trust, stating that “definitions of culture typically emphasize shared values, rituals, and beliefs, but what really defines culture – or a multicultural civilization – is trust” (p.

49). Solomon and Flores' assertion is important to acknowledge, for organizational cultures are seldom homogeneous, and if many cultures are to thrive within an organization, then part of what bounds the organization together would not be the traditional structure of a common culture (Denison, 2000), but the presence of trust (Bennis, 1999; Solomon & Flores, 2001; Wheatley, 1997).

In hierarchical organizations the nature of trust is shaped by organizational structure and management philosophies. Creed and Miles (as cited in Kramer & Tyler, 1996) argue that traditional models of authority assume that "workers lack the ability for self-direction and managers must closely supervise their employees" (pp. 16-18). Further, because of the power-status relationship, individuals in hierarchical organizations process information using different mental models and this leads to divergent perceptions, mutual disappointment and a further decline in trust (p.216). Oshry (1995) used the metaphor "tops, middles and bottoms" to describe the differentiated and conflictual relationships between employee components (p. 137). Government organizations, because of their hierarchy and traditional models of authority, create systemic internal conflict that is difficult to recognize and overcome.

Trusting relationships are essential for positive and mutually beneficial personal and organizational growth (Solomon & Flores, 2001). Trust is also what determines the individual's level of congruence and thus engagement at work (Dupree, 2001). It is an important aspect of relationship and is a recurring theme in current leadership studies that are exploring ways to create conditions for synergy and facilitate creativity in people (Wheatley, 1997). The competitive conditions facing organizations are increasingly dynamic and require adaptability. "Trust is critical to these processes. Interpersonal trust permits flexibility in responding to dynamic conditions" (Quinn, O'Neill & St.Clair, 2000, pp.5-6). Unfortunately, "negative

political behavior affects organizational processes through trust...and affects the organization's functioning" (p. 6).

Organizations can improve trust by taking proactive leadership measures. In hierarchical organizations managers and supervisors can be aware of "communicating as an equal, be open to discussion, and practice empathic and supportive communication" (Therkelsen & Fiebich, 2003; Willemyns, Gallois, & Callan, 2003, p. 126). In addition, organizations can make a commitment to implement positive organizational measures, such as visioning, empowerment, and team work. Second, reward trust and penalize distrust by implementing policies and procedures. Third, demonstrate fairness and caring, and do not abuse power. Finally, build on cooperation and independence so employees can take initiative and govern themselves (Fairholm, 1994). These ideas are not new, but to improve trust in organizations everyone must be involved.

Organizational Change

The fourth subject, organizational change, will start with a discussion of the current literature and end with an examination of the importance of employee empowerment and employee involvement. The focus will be to compare and contrast the mechanistic approach and organizations as adaptive systems.

The current thinking on organizational change states that "... to understand organizational change one must first understand organizational inertia, its content, its tenacity, and its interdependencies" (Weick & Quinn, 1999, p. 361). Most systems tend to create inertia and will remain stable until something causes both the "symbolic meaning and the adaptation system to change at the same time" (Dennison, 2000, p.4). Quinn (1996) further explains that "organizations are coalitional. The dominant coalition in an organization is seldom interested in making deep change. Hence deep change is often, but not always driven by the outside" (p. 96).

Mechanistic Approach

The mechanistic approach, a draconic model of organizational change, seeks predictability and control. The leader is viewed as apart from the organization and attempts to change systems from the outside in (Senge, 1998). Weick and Quinn bring a number of recent insights to the discussion of the mechanistic model, stating “change is not an on-off phenomenon nor is its effectiveness contingent on the degree to which it is planned” and “the trajectory of change is more often spiral or open-ended than linear. All of these insights are more likely to be kept in play if researchers focus on ‘changing’ rather than ‘change’” making this a process, not a compartmentalized finite action with a distinct beginning and end (1999, p.382).

The orientation to control while viewing oneself as being outside of the process is usually a result of being out of touch with the organization (Quinn, 1996). Wheatley (1997) asserts that leaders trying to change systems from the outside by “tinkering with incentives, resulting pieces” are not going to be successful in leading organizational change. (p. 25). Bolman and Deal (2003), using a pool table as a metaphor to describe the limitations of the mechanistic approach, as being like “firing a wobbly cue ball into a large and complex array of self-directed billiard balls. So many ball bounce off one another in so many directions that it is hard to know how things will look when everything settles down” (p. 26). This certainly supports the contention that leaders need to re-examine how they think about organizations, for whenever organizations are looked at as machines, we “deny the self-organizing capacity in our midst” (Senge, 1998, p. 16).

Complex Adaptive and Growth Systems

The emerging postmodernist paradigm contrasts the modernist mechanistic approach in its view of organizational reality as “socially constructed chaotic and continually evolving” (Thatchenkery, 1996, p. 12). Organizations as complex adaptive systems provides “metaphors

and models that articulate and make meaning out of the emerging adaptive nature of organizations” (p. 19). As a model of change, complex adaptive systems are emergent, self-organizing systems. Empowered change agents select something to change and use available facilities (container) to lead meetings (transforming exchange) where change will emerge because of diversity within the group (Eoyang, 2001).

The sigmoidal growth approach, in contrast to both the mechanistic and complex adaptive systems approaches, explains the normal cycle of almost “anything, anybody, or any organism in terms of the sigmoid curve, or sigmoidal growth (Handy, 2002, p. 31). This model explains that every organism follows a cycle of accelerated growth that slows until full adulthood is reached, and then eventually falls into decline. The only way to fully avoid the effects of this decline is to start another growth curve before the decline stage fully sets in the first one.

In summary, the change model most familiar in government organizations is the mechanistic approach. However, reflecting on my own personal experience in the public service, I have seen glimpses of creativity that is unleashed when the organization is reflecting society’s openness to emerging change and possibilities. The sigmoidal growth approach, while harder to recognize, is currently evident with the decline of traditional service models and adoption of technology,

Employee Empowerment

The current literature on organizational change emphasizes the importance of empowerment as an effective strategy in helping employees adapt. Empowerment is “illusive” (Quinn & Spreitzer, 1997, p. 39). “To empower means to enable; it means to help people develop a sense of self-confidence; it means to help people overcome feelings of powerlessness or helplessness; it means to energize people to take action; it means to mobilize intrinsic motivation

to accomplish a task” (Whetten & Cameron, 2005, p. 396). Spreitzer, de Janasz, and Quinn (as cited in Whetten & Cameron, 2005) identified four dimensions of empowerment. Whetten and Cameron added an additional dimension to the model, based on the research of Mishra. The five dimensions of empowerment include a sense of self-efficacy (competence), self-determination (choice), personal consequence (impact), meaning (value), and trust (security).

Empowerment is not something that management does to employees, but rather a mindset that employees have about their role in the organization. Organizational characteristics can increase the likelihood employee empowerment. Research by Quinn and Spreitzer (1997) determined three major barriers to change, common to most large organizations: a bureaucratic culture, multi-level conflict, and personal time constraints. To support empowerment, managers must lower these barriers.

Quinn and Spreitzer (1997) found two contrasting perspectives of empowerment – the top down mechanistic view and the bottom up organic approach. “The most important contrast between the two involves the implicit but potentially volatile assumptions people make about trust and control” (p. 39). “The reality that many of us implicitly discourage empowerment by reinforcing organizational structure and control systems that either intentionally or unintentionally send the message that we do not trust people” (p. 44). Block (1987) noted that large bureaucratic organizations encourage dependency and submission. Rules, routines, and traditions define what can be done, stifling and supplanting initiative and discretion. Therefore, Whetten and Cameron assert “in large organizations, empowerment is really needed” (2005, p 402).

So what can be done to facilitate employee empowerment? Quinn and Spreitzer (1997) recommend concurrent organizational strategies, starting with a clear vision and challenge,

followed by openness and teamwork and third, discipline and control. In other words, empowered employees understand the organizational vision, feel they are part of a valued team making a contribution, and have a clear understanding of lines of authority and responsibilities. These strategies reflect both the mechanistic and organic perspectives on empowerment. Consistent with Quinn and Spreitzer's strategic approach is the recognition of an organizational "constitution and trust as practices that increase employee empowerment" (Mills & Ungson, 2003, p. 143).

Examining call centres using the five dimension empowerment model of self-efficacy (competence), self-determination (choice), personal consequence (impact), meaning (value), and trust (security), Spreitzer et al. found that the empowerment dimensions of self-determination, personal consequence and meaningfulness seem to directly influence job satisfaction (Holdsworth & Carwright, 2002). A study of people who felt overworked concluded that if employees were to experience one or more of the empowerment dimensions, they will feel more energized and perceptions of overwork may be lessened (Quinn, O'Neill & St. Clair, 2000). Recent studies suggest that employee well-being and productivity are not at cross purposes and should be introduced in the workplace.

Employee Involvement

A supportive work environment that involves employees benefits all involved as change is often difficult and creates anxiety associated with new learning (Coutu, 2002). There are number of things that can be done at the organizational, group and individual level to change culture. Starting at the planning level, a dedicated revitalization team with a mix of cross-section of people drawn from all sectors can map existing subcultures, encourage subculture development, bring subcultures together, and measure progress (Deal & Kennedy, 1999; Schein,

2003). Organizations wanting to examine what contributes to the best of organizational life are using an appreciative inquiry approach to “touch the ‘positive core’” (Cooperrinder & Sekerkac as cited in Cameron, Dutton & Quinn, 2003, p. 226). A process called “sensemaking” helps people make sense of what is going on at the personal, organizational or community level. Sensemaking is a discursive approach to help people create context and construct meaning and mutual understanding (Weick, 1995).

It is becoming increasingly important for employees to be able to cope with change in the workplace. Some employees like to lead their own change initiatives and may see themselves as “tempered radicals”, using such creative change methods as disruptive self-expression, verbal jujitsu, variable-term opportunism and strategic alliance building (Meyerson, 2001, pp.94-100). Involving employees increases job satisfaction and reduces stress (Kienzle, 1999). For employees with a motivation need to help, it is a benefit to the organization to be open to their involvement with change initiatives (Morrison & Phelps, 1999). Other factors that increase openness to change are receiving information about the change and personal resilience, self-esteem, optimism, and perceived control (Wanberg & Banas, 2000; Sutcliffe & Vogus, as cited in Cameron, Dutton & Quinn, 2003).

The immense complexity of organizations and organizational culture makes undertaking leadership development initiatives immensely challenging. In examining leadership development in the call centres, the importance of leadership competencies must also be considered. This literature review will now examine competencies and competency development.

Competency Development

This section of the literature review will define competencies, discuss how competency models are created, and how competencies support leadership development. Identifying acting

team leader competencies will support the introduction of an integrated competency based acting team leader training and development program. The process of implementing developmental initiatives will require a collaborative effort by all stakeholders.

The competency approach as applied to human resource management is not a new concept (Blank, 1982). What can be considered competency modeling has been around for almost fifty years and there is still considerable confusion and debate regarding this movement (Blank, 1982; Evers, Rush & Berdrow, 1998; Fletcher, 1992; Raelin, 2000). Most have credited David McClelland as initiating the “Testing for competence rather than intelligence” concept when he was asked to develop a process to more effectively select US foreign service workers (Spencer & Spencer, 1993 p. 42). Twenty years after his original article in *American Psychologist*, McClelland stated in response to criticism of the competency approach, “So far as I know, knowledge tests are only being used to screen out minority candidates” (p. 8).

Defining Competencies

“Competencies are underlying characteristics of people and indicate ‘ways of behaving or thinking, generalizing across situations, and enduring for a reasonably period of time’” (Spencer & Spencer, 1993, p.9). Some definitions include references to “superior” performance, “that can be measured against well-accepted standards” and can be improved with training and development (Parry, 1996, p. 50).

Although the definitions of competence seem clear, further examination reveals that there is a “plethora of technical papers, government edicts and general guidance documents which refer to occupational competence and personal competence” (Fletcher, 1992, p. 3). Adding to the confusion is the difference between the terms “competence” and “competency”, which are often confused with one another (Winterton & Winterton, 1999). In the UK, the national, qualification-

driven system focuses on 'standards of occupational performance' or competence. The standards reflect the expectations or outcomes of workplace performance. In the USA, the emphasis has been on 'competency development'. The standards reflect the personal attributes of the individuals who have already been recognized for excellent performance (Fletcher, 2000, p.xi).

Competency Models

Competency models are increasingly being used as a foundation of human resource management systems (McLagan, 1997). In a chapter titled "Competency models: Laying the groundwork", Lucia and Lepsinger (1999) recommend a four step process. Step one requires four important decisions, starting with identifying the business need and selecting jobs that require enhancement to meet that need. The third decision includes choosing whether to start from scratch or use a validated model. The fourth decision is to select the project team. Step two defines project goals and standards, step three establishes an action plan, and in the fourth step the project team discusses performance criteria for the model (pp. 49-63).

The decision whether to start from scratch to create a competency model or use a validated model is matter of principle not choice for some practitioners. Raelin (2000) asserts that "Competencies labeled 'generic' are thought to be applicable to an entire class of managers across organizations and positions." He goes on to state, "It is my view that only organic competencies (apply to a particular managerial jobs) can have the specificity and fluidity to represent meaningful categories of managerial work" (p. 37). Raelin and Barner (2000) state that at a minimum, "competencies needs to be adjusted for contextual factors and current and future needs of an organization (p. 47). "A generic approach is also appropriate for leadership and management roles that cut across several functions and for positions that require few technical skills and knowledge" (Lucia & Lepsinger, 1999, p. 53).

“Generic models, often based on extensive research, using multiple companies and jobs, provide standardized tools for wide application” (Lucia & Lepsinger, 1990, p. 108). Data is gathered using behavioral event interviews, tests, and 360 feed back. Boyatzis (1982) identified 21 characteristics and six clusters, including goal and action management, leadership, human resource management, directing subordinates, focus on others, and specialized knowledge. An analysis of job differences at different levels of management and comparisons between the public and private sector are dated but Boyatzis’ assertion that what makes one good at one level “might interfere with effective functioning in the new job” is timeless (p. 225).

Competencies and Leadership Development

The future focus of competency models supports their use as a basis for training and development programs. Using a competency based model avoids a short-term perspective or following fads and ensures that the system focuses on the right things rather than the latest things. Lucia and Lepsinger (1999) identified four primary benefits. The first benefit is that competency models play an important part in keeping people and organizations focused on the skills, knowledge, and characteristics that affect job performance. Along the same line, Winterton and Winterton (1999) linked developing managerial competence with improved business performance.

Second, an effective training and development system must take a long-term view of organizational needs, and it must focus on developing the talent currently available in the workforce in order to meet these needs. In this way, competency models can also help a human resource department determine whether additional training programs must be developed to address future organizational needs. Competency models ensure effective use of training and development by helping to determine that the right people get the right training, at the right time

is the third benefit. Winterton and Winterton (1999), in analyzing individual and organization needs, described a “tension between the twin objectives of developing individuals and raising the core competence within an organization was identified” (p. 22). In order to achieve the best fit between the two objectives, “individual ownership coupled with a supportive environment, such as action learning or a learning organization, appeals to be most conducive to effective management development (p. 33).

And lastly, the model ensures that both the manager or coach and the direct report, have a shared picture of what it takes to succeed in the job. To establish a shared picture, potential assessment methods include performance management, assessment centre, and training needs analysis. Winterton and Winterton (1999) reviewed the evidence of 16 organizations where there was robust evidence of significant improvement in individual performance attributed to management development. Improvements most often mentioned included personal and professional confidence, and individual career advancement. Leadership development learning outcomes included using motivational and empowerment skills and communication and presentation abilities. General management skills, including understanding organizational objectives, planning, time management, and effectively running meetings, showed improvement. Project management, change management and problem solving skills improved as well.

In summary, competency models help keep an organization future focused on performance, training, and leadership development. It is hoped that this research project encouraged a meaningful dialogue of acting team leader competencies relevant to the organizational context and training and development initiatives.

Leadership Development

This section of my literature review will define frontline management, discuss leadership development, explore the role of organizations in leadership development, and examine how learning relationships can support leadership development.

Frontline Management

Yukl (2002), using early trait studies and other research, found managerial effectiveness required technical, conceptual and, interpersonal skills. Technical expertise is needed to plan, organize, and direct performance. Conceptual (or “cognitive”) skills are described by Yukl as including analytical ability, logical thinking, concept formation, inductive reasoning, and deductive reasoning. In a Center for Creative Leadership (CCL) study, weak conceptual skills were one reason for the derailment of management careers (McCauley & vanVelsor, 2004, p.72). Yukl’s third grouping, interpersonal (also called “social”) skills, includes knowledge about human behavior and group processes, ability to understand the feelings, attitudes, and motives of others, and ability to communicate clearly and persuasively. Trait research shows consistently that interpersonal skills are important for managerial effectiveness and advancement (Bass 1990).

In the 21st Century Supervisor - Nine Essential Skills for Frontline Managers (2000), authors Humphrey and Stokes, similar to Yukl, identify three broad skill areas. People skills, comparable to Yukl’s interpersonal, includes communication, team, and coaching skills. Technical skills, includes business analysis, continuous improvement, and computer skills. Third, administrative skills, includes project management, writing, and resource management skills.

The Call Centre Acting Team Leader Working Group (the Working Group) identified coaching, administration, communication, meetings, and professional development as required

skills for the team leaders role (Working Group Meeting, March 18, 2005). The Working Group's definition of communication included a cognitive/conceptual aspect. Part of the frontline supervisor's job, reflecting public sector uniqueness, is to communicate complex government and management issues.

The working group, in contrast to Yukl, did not include technical skills. The call centre team leader work description, unlike the department's standard work description, does not include analyzing performance results and implementing service delivery enhancements. In the call centre, while most of the technical work is conducted by functional specialists, the role of the supervisor is increasingly including the capture, analysis and communication of performance data. The interaction between functional specialists and line management is often tense and conflictual because of the overlap of duties.

Recognizing that there are several ways to accomplish the same ends, Hackman and Wageman (2005) assert that the "quality of team leadership provided depends heavily on: (a) the accuracy and completeness of the leader's mental models of what it takes to help a team succeed; (b) the leader's skill in executing the behaviors required by his or her mental models; and (c) the leader's ability to harvest the lesson of experiences to expand and deepen his or her knowledge base and skill set (p. 66). Using coaching as example to illustrate the three points, team leaders would be trained on the importance of timing (execution) in coaching interventions (mental model) and demonstrate learning from experience by displaying emotional maturity when facing challenges.

Leadership Development

"Leadership is learnable ...it is an observable set of skills and abilities", state Kouzes and Posner (2002, p. 387). They advise the aspiring leader to "First lead yourself", as leadership

development is self-development (p. 390). Goleman, Boyatzis and McKee, on the other hand, emphasize the importance of passion and vision, or the “ideal self”, as a first step towards one’s real self (2002, p. 115). Zenger and Folkman (2002) suggest that one must consciously decide to be a “great leader and then commit to develop and display high personal character” (p. 232).

All agree that the second step, or the discovery of the “real self”, according to Goleman et al (2002), must include a number of leadership development activities (p. 126). The activities include seeking feedback, developing new skills, and reflection on strengths, limitations and experiences.

Combining feedback and reflection, Roberts, Dutton, Spreitzer, Heaphy and Quinn (2005) present a theory of how individuals compose their “reflected best-self portraits”. Roberts et al. found that people compose their reflected best-self portrait through social experiences that provide revision opportunities. They describe these experiences as “jolts” or “aha moments” (p. 712).

“Direct reports today expect to be developed. They also expect a closer relationship with their bosses, appropriate guidance, and feedback” (Dotlich & Cairo, 2002, p. 23). Management on the other hand, has a preoccupation with the here and now and future oriented activities are practically nonexistent (van der Heijden, 2003). Research specific to the public service indicates that there is a role for supervisors in providing support to new employees, as many are reporting experiencing stress due to career mobility frustrations (Ito, 2003).

The current focus in leadership development is to provide individualized development. Conger and Benjamin (1999) provide three reasons in support of individualized leader development. First, they argue that building leaders one-by-one increases individual effectiveness and will contribute to organizational improvement. Second, leadership

development, like all learning, is “best when topics are relevant to what they need and want to know, and thus fits their learning style” (p.27). Their third point, Conger and Benjamin quote leadership experts Kouzes and Posner and state, “leadership development is very much about ‘finding your own voice’. Credibility and authenticity lie at the heart of leadership, therefore determining and defining one’s guiding beliefs and assumptions lie at the heart of becoming a good leader” (p. 28).

To create programs for effective individual development, Conger and Benjamin (1999) recommend building around a single well-delineated leadership model, establishing a participant selection process with clear criteria, conducting precourse preparation, using personalized 360 degree feedback, multiple learning methods, and conducting extended learning periods with several sessions.

The CCL (McCauley & van Velsor, 2004) provides a leader development model with a learning and relationship focus. The three-part model contains assessment, challenge, and support elements. The aspiring leader works primarily with one person, but others may be brought in to enhance the learning. The assessment element ensures the provision of feedback, guided evaluation, and planned learning. The challenge element includes coordinating assignments, role modeling, and dialogue. The third element, support, includes counselor, cheerleader, reinforcer, and companion. Overall the model is effective, however the literature suggest that other leadership element and the role of the organization must be considered.

A leadership model, focused on contributing to strategic imperatives, identifies the themes of contributing to the strategic business direction, building leadership and team skills, and self–development, as critical for business success (Cacioppe, 1998). The study

recommended widely used leadership methods, including project teams, job rotation, coaching, and feedback.

Feedback, widely used to support leadership development, can create learning anxiety if not managed effectively (London, 2002). One study found that liked people got less positive and less specific feedback compared to disliked individuals (Adams, 2004). Negative feedback, normally thought to be ineffective, will be accepted by employees “if they think the source is credible, the feedback is of high quality, and it is delivered in a considerate way” (Steelman & Rutowski, 2003, p.6). Managers wanting accurate feedback are encouraged to adopt practices of explicitly seeking feedback and a focus on negative rather than positive information (Ashford & Tsui, 1991).

Organizational Role

Kotter (1999) has stated, “institutionalizing a leadership-centered culture is the ultimate act of leadership” (p.65). Organizations have both a responsibility and a need to develop leaders.

Kotter goes on to state:

Instead of nurturing talent, encouraging people to lead and to learn from mistakes and successes, organizations all too often ignore leadership potential, offer no relevant training or role models, and punish those who make small errors while trying to lead. Individuals, too, get in their own way by failing to assess their developmental needs realistically and to proactively seek means of meeting those needs. It is a partnership.
(pp. 3-4)

Senge (1990), in his seminal book *The Fifth Discipline* describes five ‘component technologies’ converging to build organizations that can truly enhance their ability to reach

objectives. These component technologies are: (1) systems thinking, (2) personal mastery, (3) mental models, (4) building shared vision, and (5) team building.

Sandeland (1999) builds on Senge's work by reinforcing that learning is not only beneficial to the individual but also essential for the organizational health.

An individual or a team has truly had an impact on the organization when new knowledge they have created has led to change in the systems of the organization. Short-term benefits from projects are a good beginning, but the organization is only a learning organization if such knowledge is captured and systemized to the benefit of the entire organization.

(p. 26)

According to Wheatley (1999) post-modernist thinking advocates systemic relationships and integration. This has influenced theories of leadership development in a shift away from Newtonian – influenced hierarchical systems. “We need to become savvy about how to foster relationships, how to nurture growth and development” (p. 39). Senge (1998) suggests that leadership is collaborative and creative process in which all participants are leaders in their own right (p.15).

Developmental Relationships

In examining how the team leaders can contribute to furthering the growth of the acting team leader protégé learning process, the literature on self-directed learning provides guidance. Brockett and Hiemstra (1991) recommend: “critical reflection, promoting rational thinking, and using helping skills in the facilitation process” (p. 133). The role of the facilitator is to support the development of a partnership and model what it means to be a self-directed learner.

It is important to understand helping skills and how they can enhance learning. Egan, revising an earlier model, proposed that respect and genuineness must be present for there to be

an effective helping relationship. Egan stated, “Genuineness is simply ‘the quality of being oneself’” (Brockett & Hiemstra, 2001, p. 140). Genuineness is not overemphasizing one’s professional role, but rather being spontaneous, assertive, open, and consistent with one’s values and actions with others. Basic communication skills, including attending, listening, empathizing, and probing are also essential.

More recently, Short (1998), questioning traditional relationships, suggested “To learn from your relationships, you must face inside, not just outside” (p. 26). He added, “Think of learning from others as a very scientific endeavor. Just as there was a time when people didn’t know what caused the change of seasons (but thought they did), you may assume you know some things about yourself and others when you don’t” (p. 32).

Recent research by McCauley and van Velsor (2004) for the CCL found that leader protégé relationships, that included assessment, challenge, and support, provided valued development. They also reported that 360 degree feedback, challenging assignments, stretch goals, and support to master challenges increased motivation to learn and grow. Fleener and Prince (1997) found that in return, employees in a positive learning culture respond by demonstrating their willingness to learn by seeking feedback, getting outside their comfort zone, approaching problems in a learning mode, adapting to organizational transition and change, and monitoring their learning.

Mentoring has been very successful where protégés seek help from co-workers where there is a mutual attraction and rapport. (Armstrong, Allinson & Hayes, 2002). Bob Chartier (2004), sharing this perspective said, “It seems to me that that mentors are the end result of a truly fine teaching and learning relationship. Heaven knows, good relationships require attraction, time, and hard work” (p. 121). McCauley and van Velsor (2004), in comparing the benefits of formal and informal mentoring, had a number of caveats for organizations

considering establishing a formal program. In the case of formal mentoring, protégés' reported that the relationships were not beneficial. They lacked commitment and were short lived.

To model leadership, Yukl and Lepsinger (2004) advise leaders to be aware of ways to empower employees, including appropriate discretion, delegation, problem-solving and openness to learning from mistakes. Dotlich and Cairo (2002) advise leaders to "Give up some control" (p. 25). While control is looked down upon, leaders are naturally trying to control because of intense pressure for results. Dotlich and Cairo (2002) also recommend "Trust others before they earn it" (p. 22). Given the pace of change, bosses must trust their staff so that action can be taken.

The literature review has shown that the context for leadership development is complex and dynamic. The juxtaposition of formal government structure and the often chaotic operation of a call centre need to be appreciated and considered in leadership development.

In particular, the literature has highlighted the scarcity of research on leadership development in call centres, both government and private sector. With the increasing importance of call centres as a preferred service channel, the unique leadership needs of this dynamic operation should be explored further.

CHAPTER 3: CONDUCT OF RESEARCH

Introduction

This chapter will provide details about the research approach, project participants, research methods and tools, study conduct, data analysis, and ethical issues. The Research Approach section below will provide an overview of the action research project. The role of the Advisory Team and how questionnaire and focus group participants were selected and invited will be described in Project Participants section below. In Research Methods and Tools section below the researcher will describe how her research tools and procedures were developed and pilot-tested and how reliability, validity, and trustworthiness of the data were ensured. The section Study Conduct describes all the steps for data collection and analysis. This chapter ends with a full description of how the questionnaire and focus group data was analyzed and how ethical issues were addressed by the researcher.

Research Approach

This research project inquired into what competencies are essential to acting team leader performance in federal government call centres and what interventions would support acting team leader development. By identifying the essential behaviorally defined competencies and determining interventions, the goal was to develop acting team leaders who will be able to better manage day-to-day operations and be better equipped to lead change initiatives.

In this study, the researcher adopted a number of activities that were based on the principles of leading change through effective leadership and communication. When leading change Bellman (1990) asserts, it is important to learn more about what really happens when we try to change an organization and to let go of our “naïve assumptions and our need for immediate action” (p.73). The importance of process is emphasized by Palys as well. Building on the idea

of “researcher as facilitator”, Palys (2003) states, “With process at least as important as product, the point to be noted is simply that the dialogue has been engaged” and will increase organizational ownership and commitment to change initiatives” (p.28). As they collectively investigate their own situation, stakeholders build a consensual vision of their life – world” (Stringer, 1999, p. 11). This approach is fundamental to action research and fundamental to successful change management.

The overall research plan was to follow a traditional action research process of observing, reflecting and acting. The process that unfolded was dynamic and cyclical. Glanz (1998) asserts, “The process doesn’t necessarily stop at any particular point. Information gained from previous research may open new avenues of research. That’s why action research is an ongoing process” (p. 26). The Advisory Team, to be described in more detail below, were a source of data and contributed to the analytical and reflective processes, and both of these are essential to meaningful research.

Both quantitative and qualitative research methods were used in this study. The on-line survey was chosen as a way to gather quantitative and self-report information from a large number of employees, at all occupational levels, from two call centres in a time and cost efficient way. The focus group process was chosen as a way to facilitate more in-depth discussion of programs, interventions, and practices, to support acting team leader development and to cross check the reliability of the information that was collected in the survey.

Project Participants

The study involved three participants groups: all employees, the focus group, and the Advisory Team. The largest group, approximately 220 employees, was invited to participate in

the on-line questionnaire. The second largest group, the focus group, was comprised of a selected group of 12 participants from five occupational groups. The third group was the Advisory Team.

All employees, including managers, specialists, team leaders, acting team leaders, and agents were invited to complete the survey. Participant response was greatest from the agent, acting team leader, and team leader occupational groups. These are the largest occupational groups and have the greatest interest in the subject of acting team leader development.

Focus group members were selected and invited from employees who participated in a discussion group to evaluate acting team leader policy and practices. Over 20% of employees participated in the voluntary discussion groups. Recognizing that discussion group participants would bring greater familiarity with the subject of acting team leader development, the Advisory Team suggested a modification to the participant selection process to select a random sample from employees who had participated in the earlier groups. The researcher, following this recommendation, invited 12 participants, including agents, acting team leaders, team leaders, managers, and human resource specialists to the focus group.

The Advisory Team evolved out of a working group established in March 2005 to create an acting team leader training and development program. The working group, selected by the call centre managers, was a representative group of agents and team leaders from both call centres. All members shared an interest in employee development. The researcher invited a human resource learning specialist to the group to add subject matter and organizational expertise. In order to ensure that their consent was informed and that they were assured of confidentiality, the Advisory Team was fully briefed on their role and that their participation was voluntary: that their input would be confidential, and that their identities would not be revealed.

The Advisory Team was involved in all stages of the research process. It was important to the researcher to use a team approach for the design of the data gathering tools to minimize researcher bias and increase the perceived relevance and participation rates (Stringer, 1999). Once the data was collected, it was verified by the Team using a process called “member checking” (p. 176). Moving from data verification to team reflection was a critical step in the action research process.

Research Methods and Tools

The design of the questionnaire was the first task of the Advisory Team. The purpose of the questionnaire was to determine “What competencies are critical to acting team leader performance?” The researcher followed a process described by Lucia and Lepsinger (1999). The four step model recommends that at step one the researcher decide whether to “start from scratch or use a validated model” (p. 49). The authors assert that a generic approach is appropriate for leadership and management roles that require “few technical skills and knowledge” (p. 53). The researcher facilitated a rigorous process, examining three leadership competency frameworks, one from the British Columbia Provincial Government, and two from the Canadian Federal Government. The provincial framework was created and validated by the provincial sheriff’s department as part of an organizational initiative to support leadership development (Rosa, 2003). The federal government tools, one a competency based management framework developed in the 1990s by Human Resource and Social Development’s predecessor, Human Resources Development Canada, and the other, a six level integrated model created in 2005 by the Human Resource Management Agency in 2005, provided the language and classification structure common in the national government.

The Advisory Team's input helped create a tool that used familiar language and constructs (Appendix A). The questionnaire asked participants to rate the importance of 42 leadership competencies. The competencies were grouped into five clusters including communication, relationship building, problem solving, action management, and human resource management. The rating scale included six response categories (1) Not applicable or don't know; (2) Not important at all; (3) Slightly important; (4) Important; (5) Very important and (6) Extremely important. The Team's suggestion to include a comments section and participant identification categories including occupation, call centre, and years of service was adopted. To pilot the questionnaire, the researcher asked one agent and one team leader to complete the questionnaire and provide feedback.

To ensure anonymity, all employees were provided time to complete the questionnaire and it was up to the individual to decide whether they used the allotted time for the questionnaire. Approximately 70 out of a potential 220 employees completed the questionnaire, meeting the threshold for reliability. The researcher is satisfied with the level of participation on a personal level, as there is survey fatigue in the call centres, as indicated by the low interest in completing a recent national employee survey. The researcher used the Royal Roads On-line Survey as it is a Canadian tool and is not subject to the United States Patriot Act.

The focus group design and conduct was quite different than planned in the Major Project Proposal. The researcher's original plan was to use the group for what Palys (2003) describes as exploratory research, but opportunities to generate data at early stages of the project allowed the researcher to use the group to "revisit the analyzed and interpreted data". The data was the result of three discussion groups, involving over twenty per cent of employees, five occupational groups, and both call centres, established to evaluate acting team leader policy and practices.

The Advisory Team, using data from the discussions with employees and Working Group meetings, designed a proposed training and development program. The researcher presented the proposal to the focus group and facilitated an analysis of its strengths and weaknesses (Appendix A). The data also included suggestions. This process created a clear sense of consensus as to what kind of training would and would not be supported in the call centres.

The researcher used both a quantitative and qualitative research methods to ensure the reliability, validity, and trustworthiness of the information. The on-line survey provided quantitative data from a large number of employees at six occupational levels in two call centres. The focus group process was chosen as a way to facilitate more in-depth discussion of program, competencies, interventions, and practices. Each approach reinforced the findings of the other.

The verification of data by the Advisory Team provided what Stringer (1999) calls “member checking” (p. 176). The member checking process allowed participants to verify the accuracy of recorded information, and builds in an examination of reliability and validity.

Study Conduct

This section examines all the steps that were taken to collect and analyze the data for the on-line questionnaire and focus group. Detailed planning and collaboration, particularly in a tightly managed workplace like a call centre, is important for a successful study. The researcher was organized and collaborated with the call centre managers, operations specialists, and the Advisory Team.

A key activity in the design and planning stage was the importance of rigor in the design of the research tool. Starting with a validated tool, and two organizational competency models, the researcher facilitated the Advisory Team to create its own survey tool. The Advisory Team

verified the appropriateness of the language and the validity of the constructs (Lucia & Lepsinger, 1999, p. 53).

To design the focus group the researcher facilitated the Advisory Team to create a program using data from the discussion groups and Acting Team Leader Working Group. This approach, Palys (2003) asserts, allows the group to “revisit analyzed data and explore further considerations” (p. 162). The focus group members were selected and invited from employees who participated in discussion groups to evaluate an acting team leader development program proposal policy (Appendix A). Two representatives from each occupational group were randomly selected and invited to the focus group.

At the research conduct stage, the researcher took steps to create the best opportunity for participants to provide input. In the case of the questionnaire, the researcher worked with the operations specialist and managers to ensure everyone could complete the voluntary survey anonymously. An invitation was sent approximately a week in advance of the survey (Appendix B). All employees were provided with a time to complete the questionnaire. Focus group participants were sent an invitation a week in advance that described how the process was going to be conducted.

The data analysis stage involved both the researcher working on her own and the Advisory Team doing group analysis. The first step was to compile and compress the extensive questionnaire data into several spreadsheets to support a group analysis. The data from the focus group had to be compiled with other written sources in an organized manner. Then the researcher designed a group process to support the thorough analysis.

Data Analysis

The data analysis process started with an individual examination of the questionnaire and the focus group data. The approach for each was quite different as the questionnaire was primarily quantitative data, and the focus group provided qualitative data. Data from both the questionnaire and focus group was then examined together for further considerations and interpretations.

Starting with the questionnaire, data from 70 respondents, involving six occupational groups and two worksites had to be compiled into a useable format. The analysis started by creating a number of spreadsheets that presented the data by call centre and occupation. Each of the 62 competencies and five clusters was then reduced to a one digit average using the rating scale categories provided in the questionnaire. The averages described each competency as either (1) Not applicable or don't know; (2) Not important at all; (3) Slightly important; (4) Important; (5) Very important; or (6) Extremely important. In addition to the rating scale data, the researcher calculated the percentage of respondents who rated the competency as either (5) Very important or (6) Extremely important. The final version of the data included an analysis of 62 competencies by call centre and agent, acting team leader, and team leaders, the three largest occupational groups. The occupational groups, including manager, specialist, and "other" were removed from the analysis as they were too few responses and would lose their anonymity if the data was reported.

To answer the first research question, "What competencies are critical to acting team leader performance?" the researcher prepared spreadsheets that allowed the researcher and Advisory Team to compare occupational responses by call centre. The researcher facilitated a process that examined competencies where there was a two category (for example 4 and 6)

spread between occupational categories. A member of the Advisory Team stated, the difference in response indicates a “Training gap...and this would be key in designing the curriculum” (Christine White, personal communication, December 15, 2005). The Team also identified the competencies that each occupation rated as (6) Extremely important and identified response patterns based on call centre and occupation.

The overall purpose of the focus group data analysis process was to identify themes (Ryan & Bernard, 2005) and extend the meaning of the data using a discursive approach (Stringer, 1999). The researcher facilitated the Advisory Team using a three step process. The three step of the process started with a word analysis (word repetitions and key-words- in contexts) and then the words were clustered. The clusters were examined and themes were suggested by the Team and the researcher.

The first step, using several techniques suggested by Ryan and Bernard (2005), the Advisory Team focused on the identification of themes in the focus group data. The Advisory Team looked for words that were repeated, and words and their contexts. The words and phrases were posted on the wall.

The second step, using techniques suggested by Palys (2003), the group analyzed the data within the clusters. Palys, further explains, that this step often involves “noting patterns, themes, and clustering things together to begin making categories and help see connections” (p. 315). The Advisory Team was asked to compare and contrast words and phrases within and between clusters.

The purpose of the third step was to identify themes. The group reflected on the overall research process, but struggled with identifying underlying themes. Identifying themes has been described as an “abstract” and “often fuzzy” process researchers do before, during, and after data

collection (Ryan & Bernard, 2005, p. 1). The researcher asked the group if she could suggest some themes that had emerged from her preliminary analysis of the data and literature review. The themes were accepted and the researcher continued to facilitate a discussion of the data with respect to the themes.

Before the meeting with the Advisory Team the researcher used four methods to identify themes. Palys (2003) suggests reflecting on the overall research project and being aware of an iterative process that takes the researcher closer and closer to what is really relevant with each round of inquiry. Ryan and Bernard (2005) recommend looking for “connector” words that indicate causal relationships and themes that describe the experience of the participants (p. 3). The fourth activity that supports theme identification is the literature review. Ryan and Bernard assert that the researcher gains insight through reviewing the literature as, “Richer literature produces richer themes” (p. 5).

Following the meeting with the Advisory Team, the researcher reduced the five themes to three themes, as with the Advisory Team’s input, and further reflection, the themes were able to be further refined.

Ethical Issues

The issues of anonymity free and informed consent, and conflict of interest were very important in this research project. The researcher under pressure to “hand out the questionnaire to volunteers” ensured ethical research practices were adhered to by successfully negotiating 20 minutes for all staff to complete the survey in private. The survey included a consent form (Appendix B).

Unfortunately, confidential participation could not be provided for the focus group. However, participant names were not included in the in the recording or transcription of the

discussion. Focus group participants were randomly selected by the Advisory Team from a group of volunteers. Focus group participants completed a consent form (Appendix B).

The researcher, a team leader in the organization where she conducted her research, addressed the issue of conflict of interest by providing full disclosure in the recruitment letters and consent documentation.

The researcher examined her bias while preparing her research proposal. At that time she learned that the more understanding and awareness one has of one's bias and is able to communicate that to participants and stakeholders, the greater will be the overall integrity of the data and findings of the research project. Aware of her bias of favoring progressive human resource practices, the researcher communicated it to the Advisory Team during the project orientation. The Advisory Team, in their role of "member checking", provided a balanced perspective to the interpretation of the data.

CHAPTER 4: STUDY RESULTS

This chapter will present the study findings from the on-line questionnaire and the focus group. The study findings are organized into seven sections. The first five sections provide an analysis of each competency cluster, competency, call centre, and occupation from responses provided in the on-line questionnaire. Each of the five sections will include an Employment Insurance Call Centre (EI) table and an Income Security Programs Call Centre (ISP) table.

The sixth section is an analysis of focus group input on the acting team leader development program. The section has four subsections, including, general information, application process, selection process, and training and development.

The seventh section, anecdotal comments, is a summary of written comments received in the questionnaire, as well as any incidental comments surrounding the research. The final section of this chapter is a summary of the study conclusions.

The data collected was complex and contained the multiple perspectives of the various stakeholders. The researcher is aware that it is common practice to place some of the extraneous data in an Appendix. However, in this study, it appeared inappropriate to do so because all of the competencies were rated as at least "important" by each of the groups. Therefore, to relegate some of the data to an Appendix seemed to be an arbitrary action rather than presenting all the data in a sequential manner.

Study Findings

The significant finding of the on-line questionnaire is that respondents said all of the leadership competencies are important. Seventy respondents from five occupational groups at two worksites rated sixty two competencies as mostly "important" and "very important", and in some cases "extremely important". The competencies found in the communication and

relationship building cluster were more often than any of the others rated as “extremely important”. The competencies in the problem solving and human resource management clusters were described as “very important”. Action management, whose importance may be misunderstood, was often rated as “important”. The quantitative data corroborates qualitative data, as respondents emphasized the importance of training in interpersonal skills, human resource management, and action management. The data revealed a slight-to moderate distinction in response based on respondent occupation and call centre location.

The competency study findings are organized into five sections. The five sections follow the order of the survey, starting with communication, then relationship building, action management, problem solving, and lastly, human resource management. The presentation of the data and analysis in this order supports the finding that all competencies were perceived to be at least important.

Each of the five sections will include an analysis of each competency cluster, competency, call centre, and occupation from responses provided in the on-line survey. The occupations are described as A for agent, AA for an agent acting as a team leader, and TL for team leader. The response categories are (1) Not applicable or don't know, (2) Not important at all (3) Slightly important, (4) Important, (5) Very important, and (6) Extremely important. The rating of “6” was calculated by determining an average of greater than (5) and received no occupational responses below (5) Very important.

Section A - Communication Cluster

The communication cluster includes nine competencies describing effective leadership communication. All of the competencies were found to be important, and some, for example active listening, clarity, and timeliness were found to be “extremely important”. Communication

skills have been described as the “most important professional tool that the twenty-first century supervisor will possess” (Humphrey, B. & Stokes, J. 2000, p. 28).

Table 1: Employment Insurance Call Centre

The ranking of importance of the competencies in the communication cluster by respondents at the Employment Insurance Call Centre

#	Competency	A	A A	TL	CC
1	Communication cluster	5	5	5	5
2	Listens actively and sincerely.	5	6	6	6
3	Checks to make sure accurate mutual understanding during conversations.	5	6	5	5
4	Provides clear instructions and directions.	5	4	5	5
5	Chooses appropriate time and communication medium.	4	4	5	5
6	Chooses language appropriate to the person and circumstances that is consistent with the values of the organization.	4	4	5	4
7	Communicates effectively in writing.	4	4	5	4
8	Communicates important issues and information accurately and in a timely way.	5	5	5	5
9	Attentive to non-verbal cues.	4	4	4	4
10	Asks questions that elicit input.	4	5	5	4

A = agent

AA = acting team leader

TL = team leader

CC = call centre average

The top three scores in this cluster indicate a strong resonance with the leadership quality of “relationship management” (Goleman, Boyatzis & McKee, 2002, p. 52). The importance of active listening, checking for understanding, and communicating effectively can never be underestimated. These are the attributes of an emotionally intelligent authentic leader. Using an

approach of “friendliness with a purpose” p. 54), the leader creates positive resonance in the workplace.

Table 2: Income Security Call Centre

The ranking of importance of the competencies in the communication cluster by respondents at the Income Security Call Centre

#	Competency	A	AA	TL	CC
1	Communication cluster	5	5	5	5
2	Listens actively and sincerely.	5	6	5	6
3	Checks to make sure accurate mutual understanding during conversations.	5	5	5	5
4	Provides clear instructions and directions.	6	6	5	6
5	Chooses appropriate time and communication medium.	5	4	5	5
6	Chooses language appropriate to the person and circumstances that is consistent with the values of the organization.	5	4	5	5
7	Communicates effectively in writing.	5	4	5	5
8	Communicates important issues and information accurately and in a timely way.	5	5	5	6
9	Attentive to non-verbal cues.	4	4	4	4
10	Asks questions that elicit input.	4	4	5	4

A = agent

AA = acting team leader

TL = team leader

CC = call centre average

The top three scores in this cluster indicate a strong resonance with competencies that deal with clarity and action. Leaders with a ‘pacesetting style’ provide clear instructions and

directions. Goleman, Boyatzis, McKee (2002) advise that this style should be used sparingly and can be damaging if the leader lacks “empathy, self-awareness and self-management” (p. 161).

Overall, the communication cluster indicates that there is a wide range of importance placed on different aspects of verbal communication. The importance of a task focus is indicated by 80% of respondents saying it is “very” or “extremely important” to listen actively and sincerely (2), provide clear instructions (4), and communicate important issues and information accurately and in a timely way (7).

Team leaders feel it is “very important” to choose the appropriate time and communication medium (5) and that the language is appropriate to the person and circumstances (Working Group Meeting, June 16, 2005.) Team leaders have learned from experience, it is not just what you say, but how you say it.

An Advisory Team member, observing the connection between communication and trust, stated that the themes of “Communication, transparency, equity and fairness” came up a number of times in the group discussions (Pat Brand, personal communication, September 22, 2005). The literature on trust in hierarchical organizations points to power-status relationships as the cause of the distrust. Individuals in hierarchical organizations process information, using different mental models, and this “leads to divergent perceptions, mutual disappointment and a further decline in trust” (Creed and Miles, as cited in Kramer & Tyler, 1996, p.216). To overcome these hurdles, managers and supervisors can be aware of “communicating as an equal, be open to discussion, and practice empathic and supportive communication” (Therkelsen & Fiebich, 2003; Willemyns, Gallois, & Callan, 2003, p. 126).

Section B - Relationship Building Cluster

The relationship building cluster includes ten competencies describing elements of effective relationship building behaviour for acting team leaders. The importance of this cluster is indicated by more than 80% of respondents stating that honesty, fairness, and creating a positive work are “extremely important”. Relationships have been described as the “very heart and soul of an organization’s ability to get the job done” (Short, 1998, p. 15).

Table 3: Employment Insurance Call Centre

The ranking of importance of the competencies in the relationship building cluster by respondents at the Employment Insurance Call Centre

#	Competency	A	AA	TL	CC
11	Relationship building cluster	5	5	5	5
12	Consistently delivers what has been promised.	5	6	4	5
13	Answers questions honestly and maintains integrity.	5	6	5	5
14	Treats people fairly, without bias or favoritism.	5	6	6	6
15	Consistently promotes a positive work environment.	5	6	5	5
16	Seeks to understand, and respects the values and beliefs of others.	5	6	5	5
17	Gives team members constructive and supportive feedback about their performance.	5	6	6	5
18	Demonstrates care and concern about the welfare of others.	5	4	5	4
19	Remains objective and unbiased when resolving conflicting positions.	5	4	6	5
20	Interacts sensitively and respectfully with diverse individuals and groups.	4	4	5	4
21	Promotes an environment that is free of discrimination and harassment.	5	6	6	5

A = agent

AA = acting team leader

TL = team leader

CC = call centre average

The importance of treating people fairly, without bias or favoritism, providing constructive and supportive feedback and promoting an environment that is free of discrimination and harassment are competencies that Employment Insurance Call Centre participants rated as very important in the survey.

There are two pairs of responses in this cluster that the researcher asked the Advisory Team to examine. The first one, “remain objective and unbiased when resolving conflicting positions” was rated as “important” to actors but “extremely important” to team leaders. The Advisory Team explained that the actor may not see it as their role to resolve conflict as they are acting for a short period of time.

The divergence of responses to “Consistently delivers what has been promised”, creates emotional dissonance for team leaders as they know it is important to demonstrate integrity by “doing what you say you are going to do”, but also recognize that sometimes it is almost impossible to follow through because of workplace circumstances (Advisory Team Meeting, December 15, 2005).

Income Security Program Call Centre participants rated many of the competencies as very important. Table 4 provides details of the importance of answering questions honestly, without bias or favoritism, providing constructive and supportive feedback, and promoting an environment that is free of discrimination and harassment.

The data suggests Income Security Program Call Centre actors place a lower importance on promoting a positive work environment, understanding, and respecting the values and beliefs of others and interacting sensitively and respectfully with diverse individuals and groups. Actors may have more of a task focus and place less importance on relational considerations.

The role of actors in “Giving team members constructive and supportive feedback about their performance” is a sensitive issue. Many agents feel “acting team leaders should not be involved in performance management” (Questionnaire, October 2005). The collective agreement states that actors are to perform the full range of job duties (Collective Agreement, article 64.07 [a]).

Table 4: Income Security Call Centre

The ranking of importance of the competencies in the relationship building cluster by respondents at the Income Security Program Call Centre

#	Competency	A	AA	TL	CC
11	Relationship building cluster	5	5	5	5
12	Consistently delivers what has been promised.	5	5	5	5
13	Answers questions honestly and maintains integrity.	5	5	5	6
14	Treats people fairly, without bias or favouritism.	6	5	6	6
15	Consistently promotes a positive work environment.	5	4	6	5
16	Seeks to understand, and respects the values and beliefs of others.	5	4	6	5
17	Gives team members constructive and supportive feedback about their performance.	4	5	6	5
18	Demonstrates care and concern about the welfare of others.	5	5	5	5
19	Remains objective and unbiased when resolving conflicting positions.	5	5	5	5
20	Interacts sensitively and respectfully with diverse individuals and groups.	5	4	5	5
21	Promotes an environment that is free of discrimination and harassment.	5	5	6	6

A = agent

AA = acting team leader

TL = team leader

CC = call centre average

In summary, the relationship building competencies in Table 3 and Table 4, received the greatest support for competencies identified as critical for acting team leader performance. Seven out of ten competencies were rated as either “very important” or “extremely important” by more than 80% of respondents. Short (1998) supports the importance of relationships in his findings and asserts that “relationships are the very heart and soul of an organization’s ability to get any job done” (p. 15).

During times of organizational turmoil the importance of trusting relationships is elevated. Trust has been defined as “...one party’s willingness to be vulnerable to another party based on the belief that the latter party is (a) competent, (b) open, (c) concerned, and (d) reliable (Mishra, as cited in Kramer & Tyler, p. 265). Participants, while not specifically using the word trust, said that doing what you say you are going to do, being open and honest, and treating people fairly is “very important”. “Few other conditions offer so great an opportunity to enhance trust” or destroy it by nonperformance being seen as “acts of complete betrayal” (Webb, as cited in Kramer & Tyler, p. 293).

Section C - Action Management Cluster

The action management cluster includes 16 individual competencies describing planning and organizing work, process improvement, partnerships, and change management. Many respondents indicated that they thought these competencies were “important” but few said “very important” and no one said “extremely important”. The importance of competencies in the action management cluster was highlighted by the researcher in Chapter One when she described the strategic objectives of the department and stated that there are “increasing operational demands to meet nationally dictated service levels and communicate change initiatives to staff”. The

Advisory Team made a similar observation, noting the relative low importance respondents placed on the action management competencies.

Table 5: Employment Insurance Call Centre

The ranking of importance of the competencies in the action management cluster by respondents at the Employment Insurance Call Centre

#	Competency	A	AA	TL	CC
22	Action management cluster	4	4	5	4
23	Supports organizational changes required to achieve strategic priorities.	4	4	4	4
24	Identifies future challenges and prepares to meet them.	4	4	4	4
25	Sets goals and action plans.	4	4	4	4
26	Responds to change in a planned way.	4	4	4	4
27	Understands and participates in the implementation of the business plan.	4	3	4	4
28	Promotes best practices.	5	4	4	4
29	Works in a way that respects and considers partners.	5	4	5	4
30	Organizes time and tasks efficiently.	5	4	5	4
31	Collaborates with the work force manager in the capture, analysis, and utilization of operational data.	4	4	5	4
32	Understands, encourages and uses technology efficiently.	4	4	5	4
33	Manages resources effectively.	4	4	5	4
34	Understands, applies and evaluates the degree to which the service delivery is met.	4	4	5	4
35	Considers the impact of technology on the future of the call centre.	4	3	4	4
36	Assesses team needs, problems and potentials.	5	5	5	5
37	Shifts priorities and adapts work plans to reflect changes.	5	4	5	4
38	Facilitates creative problem solving and innovation.	5	4	4	4

A = agent

AA = acting team leader

TL = team leader

CC = call centre average

The differential responses to the competencies in this cluster indicate a gap between the overall value (5 very important) team leaders place on planning and organizing work and the value (4 important) agents and actors place on it at the Employment Insurance call Centre. This is troubling for team leaders as they would like actors to take full ownership of the job and share the organization's strategic priorities.

The Advisory Team talked about how the competencies detailed in this section reflect many of the organizational changes that have occurred in the last year. They are struggling with scheduling, adherence and call centre harmonization (Advisory Team Meeting, December 15, 2005).

The Income Security Call Centre responses to action management cluster competencies (Table 6), like the Employment Insurance Call Centre responses, indicate a small gap between the overall value (5 very important) team leaders place on planning and organizing work and the value (4 important) agents and actors place on it. This gap, although present, is not a serious discrepancy and is probably the result of lack of acting opportunity and training.

While agents and actors stated it was "very important" to work effectively with external partners and that time and tasks should be organized efficiently, they rated the relationship with an internal partner, the workforce manager, as only "slightly important". The proposed acting team leader training program will include a module on key performance indicators delivered by the workforce manager. The workforce manager is the local specialist linking the call centres to the national network.

Table 6: Income Security Call Centre

The ranking of importance of the competencies in the action management cluster by respondents at the Income Security Program Call Centre

#	Competency	A	AA	TL	CC
22	Action management cluster	5	4	4	4
23	Supports organizational changes required to achieve strategic priorities.	3	4	4	4
24	Identifies future challenges and prepares to meet them.	4	4	4	4
25	Sets goals and action plans.	4	4	4	4
26	Responds to change in a planned way.	4	4	4	4
27	Understands and participates in the implementation of the business plan.	3	3	4	4
28	Promotes best practices.	4	4	4	4
29	Works in a way that respects and considers partners.	5	5	4	5
30	Organizes time and tasks efficiently.	5	5	5	5
31	Collaborates with the work force manager in the capture, analysis, and utilization of operational data.	3	3	5	4
32	Understands, encourages and uses technology efficiently.	4	4	5	4
33	Manages resources effectively.	4	4	5	4
34	Understands, applies and evaluates the degree to which the service delivery is met.	4	4	5	4
35	Considers the impact of technology on the future of the call centre.	4	3	5	5
36	Assesses team needs, problems and potentials.	5	5	5	5
37	Shifts priorities and adapts work plans to reflect changes.	5	4	5	4
38	Facilitates creative problem solving and innovation.	5	5	4	5

A = agent

AA = acting team leader
TL = team leader
CC = call centre average

All employees are struggling with changes of going from regional call centres to being a part of a system where calls are networked nationally. During the final meeting of the Advisory Team, members talked about how the competencies detailed in this section reflect many of the organizational changes that have occurred in the last year. They are struggling with scheduling, adherence and call centre harmonization (Advisory Team Meeting, December 15, 2005).

At the same meeting, the Team noted how actors rated communication and relationship building competencies as “very” or “extremely important” in the questionnaire, but in the discussion and focus group emphasized the importance of knowledge and skills training related to action management and human resource management.

The lack of understanding of the importance of the work force manager was noted by the Advisory Team. During the questionnaire design process the Team purposefully included a competency describing the importance of a collaborative relationship between the acting team leader and the work force manager. Team leaders said the competency was “very important”, Employment Insurance agents and actors rated it as “important”, and Income Security Program agents and actors said it was “slightly important”.

Section D - Problem Solving Cluster

The problem solving cluster includes five competencies describing decision making, collaboration, conflict resolution, and applying ethical standards. Approximately 60% of respondents described all of the competencies in this cluster as “very important” for acting team leader performance.

Table 7: Employment Insurance Call Centre

The ranking of importance of the competencies in the problem solving cluster by respondents at the Employment Insurance Call Centre

#	Competency	A	AA	TL	CC
39	Problem solving cluster	5	4	5	5
40	Makes reasoned decisions in a timely manner.	5	5	5	5
41	Addresses the source, not just the symptom, of problems.	5	4	5	4
42	Resolves problems using consultation and consensus, when appropriate.	5	4	5	4
43	Anticipates and manages problems and conflicts effectively.	5	5	5	5
44	Understands and applies established ethical standards.	5	4	6	5

A = agent

AA = acting team leader

TL = team leader

CC = call centre average

The pattern that emerges from this data is that actors rated the problem solving competency as lower than both agents and team leaders. The Advisory Team explained that because actors are in the job on a temporary basis, they may choose not be involved in complex problem solving (Advisory Team Meeting, December 15, 2005). The Working Group, in contrast, stated that their hope was that actors would take full ownership of the job (Working Group Meeting, June 23, 2005).

The Income Security Program gave this cluster and each competency an overall rating of “very important”. The aspiring actor may want to include problem solving training in their Learning Plan to ease the transition into the acting team leader job.

Table 8: Income Security Call Centre

The ranking of importance of the competencies in the problem solving cluster by respondents at the Income Security Program Call Centre

#	Competency	A	AA	TL	CC
39	Problem solving cluster	5	5	5	5
40	Makes reasoned decisions in a timely manner.	5		4	5
41	Addresses the source, not just the symptom, of problems.	5	5	5	5
42	Resolves problems using consultation and consensus, when appropriate.	5	5	5	5
43	Anticipates and manages problems and conflicts effectively.	5	5	5	5
44	Understands and applies established ethical standards.	5	5	5	5

A = agent

AA = acting team leader

TL = team leader

CC = call centre average

All the competencies in this cluster are viewed as of equal importance as there is a small spread in rating scores. It shows that between 52 – 62% of respondents rated problem solving as “very important”. Timely problem solving reflects the task-oriented nature of work in call centres.

Section E - Human Resources Management Cluster

The human resource management cluster, the largest in the framework, included 22 competencies. Most of the competencies were described as “very important”. This cluster has the greatest spread in consensus for individual competency importance. Two competencies, “Models and elicits trust” and “Takes ownership for decisions” were rated by approximately 70% of participants as “extremely important”. More than half of participants stated building team morale, modeling confidence, managing compensation, benefits and leave, identifying training needs, recognizing positive performance, and coaching are “very important”. Competencies considered “important” by only 30% of participants included adjusting to change, keeping the manager informed of concerns, modeling work-life balance, continuous learning, and supporting mentoring opportunities.

The presentation of Tables 9 and 10 have been reordered to accommodate the large tables and analysis. An analysis of the Employment Insurance Call Centre data will precede the table and an analysis of Income Security Program Call Centre data will follow the Table 10. A final summary will then be presented.

Table 9 (below) details how Employment Insurance Call Centre employees rated human resource management competencies. Actors, concerned with working relationships, rated building morale, having a positive attitude, recognizing positive performance, coaching, and innovation competencies, as “very important”. Team leaders, on the other hand, rated leadership and performance competencies as “very important”.

Team leaders rated “taking ownership of own decisions” as “extremely important” and agents rated it as “very important”. This is in contrast to actors, who rated the competency as “important”. This is consistent with earlier responses in the problem solving cluster.

Table 9: Employment Insurance Call Centre

The ranking of importance of the competencies in the human resource management cluster by respondents at the Employment Insurance Call Centre

#	Competency	A	AA	TL	CC
45	Human resource management cluster	5	5	5	5
46	Builds team morale and facilitates team motivation and achievement.	5	6	5	5
47	Models and elicits trust.	5	6	6	5
48	Models a confident and positive attitude.	5	6	6	5
49	Heeds early warning signals and advises the manager and others, as needed.	4	5	5	4
50	Manages compensation and benefits and employee leave.	5	6	5	5
51	Takes ownership of own decisions.	5	4	6	5
52	Demonstrates flexibility by adjusting readily to change in the work environment.	5	5	5	5
53	Establishes work-life balance.	4	4	4	4
54	Models successful coping in stressful situations.	4	4	5	5
55	Adopts a continuous learning approach and works towards self-improvement.	4	4	5	4
56	Encourages mentoring opportunities.	4	5	5	5
57	Identifies employee training needs.	5	5	5	5
58	Instructs staff on tasks, goals, processes and performance standards.	4	4	5	5
59	Recognizes and acknowledges positive performance.	5	6	5	5
60	Ensures a meaningful performance evaluation process takes place.	5	4	5	5
61	Addresses below standard performance and directs improvement.	5	4	5	5
62	Approaches mistakes as learning opportunities.	5	4	5	5
63	Coaches without assuming control.	5	5	5	5
64	Counsels, mentors or coaches others towards higher performance levels.	5	6	5	5
65	Supports creativity and innovation.	5	6	4	4
66	Encourages contribution and participation by all members of the team.	5	6	5	5
67	Empowers others to assume leadership and responsibilities.	4	4	5	4

Table 10: Income Security Call Centre

The ranking of importance of the competencies in the human resource management cluster by respondents at the Income Security Program Cluster

#	Competency	A	AA	TL	CC
45	Human resource management cluster	5	4	5	5
46	Builds team morale and facilitates team motivation and achievement.	5	4	5	5
47	Models and elicits trust.	5	5	5	5
48	Models a confident and positive attitude.	5	4	5	4
49	Heeds early warning signals and advises the manager and others, as needed.	3	4	5	4
50	Manages compensation and benefits and employee leave.	5	5	6	5
51	Takes ownership of own decisions.	5	5	5	5
52	Demonstrates flexibility by adjusting readily to change in the work environment.	5	4	5	4
53	Establishes work-life balance.	5	4	5	4
54	Models successful coping in stressful situations.	5	4	5	5
55	Adopts a continuous learning approach and works towards self-improvement.	4	4	5	4
56	Encourages mentoring opportunities.	4	3	5	4
57	Identifies employee training needs.	5	4	5	4
58	Instructs staff on tasks, goals, processes and performance standards.	4	4	5	4
59	Recognizes and acknowledges positive performance.	5	5	6	5
60	Ensures a meaningful performance evaluation process takes place.	4	4	5	4
61	Addresses below standard performance and directs improvement.	4	4	5	4
62	Approaches mistakes as learning opportunities.	4	4	5	5
63	Coaches without assuming control.	4	4	5	4
64	Counsels, mentors or coaches others towards higher performance levels.	4	4	5	4
65	Supports creativity and innovation.	4	4	4	4
66	Encourages contribution and participation by all members of the team.	4	4	5	4
67	Empowers others to assume leadership and responsibilities.	4	4	4	4

A = agent

AA = acting team leader

TL = team leader

CC = call centre average

In the Income Security Program table above agents and actors rated most of the human resource management competencies as “important” and team leaders rated them as “very important”. All participants value managing “compensation and benefits and employee leave, being aware of the collective agreement...” A proposed acting team leader training program will include training on these subjects.

Overall, three issues emerged from the two tables detailing human resource management competencies. The three issues are the importance of trust, the valuing of human resource practices, and the need for human resource training.

Two competencies, emphasizing the importance of trust and integrity, were identified by participants as critical for acting team leader performance. All participants said “Models and elicits trust” and “Takes ownership of own decisions” are “very important”. This issue will be further examined in the focus group data and study conclusions.

The importance of progressive human resource practices was indicated by many participants. Two competencies in particular, “Builds team morale and facilitates team motivation and achievement” and “Recognizes and acknowledges positive performance”, were rated as “very important” by most participants. Recent call centre research identified specific skills for team leaders to support agents. Team leader interpersonal skills include: coaching, group leadership, developmental feedback, empowerment, identifying task variety, debriefing emotional dissonance, and communicating organizational resources to support agents (Holman 2003). Current best practices include building trusting relationships, mentoring and supporting social networks (Cheriniss & Goleman, 2001).

The third issue, human resource training, emphasizes the need to bring together policy and tools in a training program. The data in this section shows that most participants rated “Managing compensation and benefits and employee leave, being aware of the collective agreement, federal legislation, regulations and policies” as “very important”. Throughout the research process agents and actors stated, “Actors should have more training in corporate services and staffing material”. Actors also said that it is important to have “equal and consistent access to tools such as key performance indicators, vacation scheduler & symposium” (Discussion Group, September 14, 2005). The Advisory Team, building on earlier suggestions, recommended creating a Manual that provides “consistent access to the same information, union, H&S, evacuation, attendance, Symposium, client complaints” to support actors in fulfilling team leader duties (Advisory Team Meeting, December 15, 2005).

Section F – Analysis of Focus Group Input of Development Program

This section will provide an analysis of focus group input on the acting team leader development program. The analysis will follow an outline of the program that includes four key subjects and guidelines specific to each subject. The four subjects are: general information, application process, selection process, and training and development.

General Information

1. Select one actor and one back-up actor per team. The developing actors will be part of a pool that provides coverage to their own team in situations of less than 3 days and to the call centre of opportunities of greater than 3 days.

The importance of trust and leadership development was stated in the discussion group, in anecdotal comments in the survey, and during the focus group. The discussion groups that were conducted in September emphasized that the program should ensure “consistency” and that

actors should be “rotated”. A participant asserted, “there must be consistency in all aspects of the acting position for team leaders – i.e. selection, training, access, feedback, unit to unit, EI & ISP must follow the same rules” (Discussion Group, September 15, 2005). Using a rotational process would provide a more equitable distribution of acting time and greater learning.

The literature on formal organizations recognizes the practice of making rules to manage situations. In formal organizations, “Employee behavior is influenced by hierarchy, segmentation and rule orientation of formal organizations” and “The result is an increased demand for hierarchy and rules to signal correct behavior (Warwick, 1974, p. 111). However, organizations can improve trust by taking proactive leadership measures. The first step is making a commitment to implement positive organizational measures, such as visioning, empowerment, and team work. Second, reward trust and penalize distrust by implementing policies and procedures. Third, demonstrate fairness and caring, and do not abuse power. Finally, build on cooperation and independence so employees can take initiative and govern themselves (Fairholm, 1994).

The leadership development discussion focused on the importance of development and opportunity. The program would “Allow actors a chance to learn” and “Participation in a developmental program for 1 year allows more opportunities for others who are interested” (Focus Group, November 10, 2005).

2. Developing acting team leader acting time will be jointly tracked by team leaders and managers.

Tracking time as a solution to the inequitable distribution of acting time was proposed by the Advisory Team in October. It was supported by the Focus Group in November, and again by

the Advisory Team in December. Tracking acting time is an established practice in the EI call centre and with one team in the ISP call centre.

3. Participation in the program will be one year in length.

There is wide support for the one year term. Some did suggest six months.

4. Developing actors will select a mentor from a list of available Team Leaders after the selection process is complete.

This recommendation is not consistent with the formal reporting relationships typical in the federal government (Advisory Team meeting, December 12, 2005). It was originally suggested as a solution to what appeared to be a shortage of team leaders available to coach actors (Advisory Team Meeting, October 6, 2005). Some focus group members liked the idea of choosing their own mentor as they “Feel closer to mentor on another team”. The focus group recommended clarifying and defining mentoring and coaching. Based on their understanding of the two practices, the focus group preferred coaching (Focus Group, November 10, 2005).

Application Process

1. Using the acting team leader profile as a tool, applicants will complete a self-assessment and provide examples of current performance and state learning goals.

Early in the research process several participants said “There should be a list of competencies developed, and the candidates must satisfy this skill set in order to act” (Discussion Group, September 14, 2005). The researcher worked with the Advisory Team to create a questionnaire to gather input on acting team leader competencies. The questionnaire was successful in facilitating a dialogue of acting team leader competencies, and will be used in conjunction with departmental competency profiles to finalize an acting team leader profile (Advisory Team meeting, December 12, 2005).

Most focus group members recognize the benefits of assessment, reflection, and setting learning goals. One member stated it is “Good to have a self-assessment beforehand” (Focus Group, November 10, 2005).

2. Provide a letter of interest that describes openness to feedback and learning.

The leadership development literature provides many examples of how to create a learning oriented acting team leader program. The Centre for Creative Leadership (CLC) (McCauley & van Velsor, 2004) provides a leader development model with a learning and relationship focus. The three-part model contains assessment, challenge, and support elements. The aspiring leader works primarily with one person, but others may be brought in to enhance the learning. The assessment element ensures the provision of feedback, guided evaluation, and planned learning. The challenge element includes coordinating assignments, role modeling, and dialogue. The third element, support, includes counselor, cheerleader, reinforcer, and companion. Overall the model is effective, however the literature suggest that other leadership element and the role of the organization must be considered.

Selection Process

1. Call centre managers and team specific team leader jointly select participants.

The Advisory Team asserted that “Agents and actors are concerned about transparency and team leaders want people who are open to learning (December 12, 2005). A human resources consultant asserted that program objectives must be examined as to the impact on formal competitions (Focus Group, November 10, 2005).

2. Learning plan with developmental focus available to all applicants.

All participants supported this recommendation. The unanimous support reflects the importance of the need for inclusiveness and learning.

3. Mandatory post board facilitated by team leader.

In an effort to address the need for a transparent selection process, the Advisory Team suggested a post board for all applicants (October 6, 2005). This suggestion was made by many participants in the September discussion groups (September 14-15, 2005). The use of the expression 'post board' is a misnomer as the program will not be using a selection process as defined by formal selection procedures.

Training and Development

1. Reference manual

The suggestion for a Manual was first made by the Working Group (March 17, 2005). The Working Group, like the agent discussion group, suggested the manual should include leave administration, attendance, Symposium, adherence and procedures and protocols for health & safety, union-management and evacuation. The Manual would also specify duties and access to systems based on the length of acting assignment and detail roles and responsibilities for actors, workforce manager, program advisor and manager.

2. Training program – modified HR 101, key performance indicators, new leader orientation.

All research participants supported the development of a training program for acting team leaders. Participants in the September discussion groups said that there is a "Lack of human resource management training and key performance indicators". "Actors should have more training in corporate services and staffing material" (September 14 & 15, 2005). The focus group said that they "like the training and everyone gets the same" (November 10, 2005). The Advisory Team, during their examination of questionnaire and focus group data asserted "competencies should be included in the training program (December 12, 2005).

3. Learning oriented feedback and assessment tools and practices: Feedback, 360 degree feedback, learning agreements and portfolios.

The discussion on feedback went full circle during the research process. During the September discussion groups it was suggested that there was a need for “formal training and formal evaluation and feedback” and “Feedback sessions between team leaders and their actors should be established” (September 14 & 15, 2005). The focus group asked “Why is it a part of the program? How is it being built into the program?” Another participant stated “Constructive feedback should be timely, regular, scheduled and from a qualified person”. Training should be provided so that the “person providing feedback should know how to do it – more than ‘you suck’” (November 10, 2005).

The Advisory Team, aware that there has to be certain commitment of trust in the giving and receiving of feedback, recommended training on feedback. (October 6, 2005). The Team recommended workshops on “Learning oriented feedback and assessment tools and practices” for both team leaders and actors.

4. Workshops, tools and practices to support team leaders as mentors: Learning oriented feedback, mentoring best practices and adult learning and learning styles.

The researcher first recognized the need for training on adult learning and learning relationships during an early meeting of the Working Group (March 17, 2005). The group often expressed the need to have a greater understanding of the principles of adult learning. The importance of understanding adult learners was asserted by both the discussion groups and focus group participants. The participants stated that the acting team leader program “Should be an adjustable and targeted plan for the learner” and “Management should show patience during any learning curve” (September 14, 15 and November 10, 2005).

Section G – Anecdotal Comments

The data gathering process provided an opportunity for extensive input. Two issues that surfaced and did not comfortably fit into the questionnaire or focus group analysis will be examined here. The first issue is the pace, frequency, and magnitude of change. The second issue is “giving people time off the phones” for training and development (Christine White, personal communication, May 2005).

The pace of change significantly increased two years ago. “Starting in 2004, the structure and reporting relationships changed from a regional to a national focus. Call Centre Harmonization (CCH) was established as part of the Modernizing Service for Canadians. The goal of CCH, as mandated in Enterprise-Wide Management, is “to support consistency in the caller experience and make the best of possible use of resources and tools” (2003b, HRDC). Standardized processes and procedures have been established to support CCH.

A parallel change, the launch of Service Canada, had a smaller impact on the call centres than CCH, but had a large impact on the call centre’s service partners. The goal of Service Canada is to provide Canadians with easy access to Government of Canada programs and services through a single service delivery network. The service delivery network includes telephone, internet and in-person service.

The standardization of processes and procedures has resulted in many changes in the call centres. Both call centers are struggling with CCH changes that require that most off phone activities be scheduled and tracked. A member of the Advisory Team said that staff “...have to save up 10 minutes worth before meeting with Team Leader” (Advisory Team Meeting, December 12, 2005).

The call centers are experiencing two levels of merging, one at the local level and one at the national level (Roger Lesage, personal communication, January 3, 2006). Employees of merging organizations often feel “plundered, exploited, and occupied. They frequently react with anxiety, paranoia, and hostility toward the acquiring firm (Trice & Beyer, 1993, p. 245).

Staff communicated merger anxiety during the discussion groups, questionnaire and focus group. A discussion group participant stated, “ISP and EI employees should not be able to cross over into acting positions in the other department, unless proper and full training is given beforehand (September 14, 2005). Written comments in the questionnaire stated, “I strongly feel that any acting team leader ought to know about the programs they are leading” and “How can they (actor) help out if the queue is busy?”

The merged call centres will have one manager. With each call centre having its own manager, ISP staff have easy access for informal meetings. Team leaders and actors will have to adapt to less accessibility to the manager. This change may encourage greater collaboration at the team leader level.

The second issue, “What is operational impact of acting team leader program?” was raised by a member of the Advisory Team. The issue of how to manage a program that is “in sync with call centre operations” is a challenge given “Limited current resources- adherence, scheduling, salary dollars” (Advisory Team Meeting, December 15, 2005). At the same meeting, a member asserted, to get buy-in we “Need to communicate that it is an organizational need to have trained actors – need buy-in – so that there is no resentment when off the phones”. Another member, referring to the important role team leaders will play said, “It will be a change for team leaders to be involved in more formal approach to actor development” (Advisory Team Meeting, December 15, 2005).

Study Conclusions

1. All the leadership competencies, including communication, relationship building, action management, problem solving, and human resource management are important.

The quantitative data from the on-line questionnaire corroborated the qualitative data from the focus group as respondents in both processes emphasized the importance of all the leadership competencies.

The importance of interpersonal competencies including communication, relationship building, and trust are essential for frontline leadership. Written comments in the questionnaire echoed a similar message, stating “The most important qualities I seek in a team leader are fairness, approachability, availability, sincere concern for and interest in team members.”

The competencies in the action management section reflect many of the strategic organizational changes being implemented to accomplish service delivery goals such as call centre harmonization. They are also the competencies that are linked to the changes staff are struggling with – adherence and scheduling. The human resource management competencies reflect both the importance of interpersonal leadership competencies such as building team morale and acknowledging positive performance and the knowledge and skill competencies required to manage compensation and benefits and the collective agreement.

2. An acting team leader development program should include knowledge and skills training, feedback, competency development, acting assignments and support.

“A plan that everyone buys into, it is inclusive and provides learning opportunities”

(Anonymous, 2005).

The importance of a structured program providing classroom training in staff relations, compensation and benefits, leave administration, key performance indicators, and scheduling will be a foundation piece of the acting team leader program.

There is wide support for including feedback in the program but it must be approached cautiously. One participant wrote “I believe that acting team leaders need more feedback for development during the times they are acting as a team leader” (Questionnaire, written comments). The proposed program will include workshops on feedback best practices, learning relationships, and adult learning.

Support for an acting team leader profile was expressed by many participants. Integrating competencies into the training program will support a future focus for the call centres. It will also support the development of trust, open communication, relationship building, empowerment, and self-directed learning.

Many leader development models include acting assignments. The Center for Creative Leadership’s three-part model contains assessment, challenge, and support elements. The challenge element includes assignments (McCauley & van Velsor, 2004).

3. Employees, overwhelmed by organizational change, are finding it hard to adapt.

The call centres seems to be suffering from what Schein (2004) describes as a loss of “functional familiarity” (p.108). The Vancouver call centres, originally part of a regional service delivery network, are now part of a national structure. This has resulted in a misunderstanding across subcultures, loss of trust, and increased formal contracting.

During times of organizational uncertainty “groups tend to revert to one of three styles of operation that employs different kinds of defense mechanisms against anxiety: dependency, pairing, or fight-flight” (Morgan 1998, p. 196). Call centre team leaders describe a type of

dependency that involves “an excuse for personal inaction” on the part of the agent. (p. 196-197). Several participants in the discussion groups said it was important to have “...a body at the supervisor’s desk” (September 15, 2005). When examining this paradox, the Advisory Team stated, agents want “Someone in the chair” but “Nothing is that urgent”. Another member asked the team to consider the concept of “absence presence”, a leadership practice that supports an empowered work team in the leader’s absence (October 6, 2005).

With each call centre having its own manager, ISP staff have had easy access for informal meetings. As the time for the merger approaches, the uncertainty may trigger a display of the second defense mechanism, pairing. Pairing “paralyzes the group from taking action... (as) a messiah figure will emerge to deliver the group from its fear and anxiety” (p. 197). On the other hand, actors and team leaders may adapt to less accessibility to the manager and increase collaboration at the team leader level.

The third defense mechanism, flight – fight, involves identifying an enemy, in this case the other call centre, and “This enemy embodies the unconscious persecutory anxiety experienced by the group” (p.197). In a recent discussion, an EI call centre employee stated to the researcher, “I am dreading amalgamating with ISP as they are so negative over there” (Anonymous, personal communication, February 18, 2006).

The resistance by many staff to use the Service Canada closing, “Are there any other government services I can help you with? Thank you for calling Service Canada”, could be described a way of resisting forced change. Groups often adopt “utilitarian practices” to abide by whatever rules are essential and then develop countercultural norms (Schein, 2004, p. 17).

Scope and Limitations of the Research

The limitation of this study is that all of the competencies were found to be important. Approximately 10 competencies in the communication, relationship building, and human resource management cluster were found to be “extremely important”; all of the other competencies were either “very important” or “important”. The study was not able to identify what was not important to staff. Also, another limitation of the study is that there is not enough time to operationally define the meaning of the competencies and quantitatively test the inter-rater reliability. However, the qualitative methods used in this study did provide opportunity for respondents to the survey to refine the meanings of some of the survey items.

CHAPTER 5: RESEARCH IMPLICATIONS

This chapter will provide six recommendations, suggest an implementation process, and propose future research. The six recommendations are based on a thorough action research process that started with data gathering and analysis, and ended with research findings and conclusions.

This project asked, “What behaviorally defined competencies are essential to acting team leader performance?” and, “What interventions, programs or practices would support acting team leader development?” In response to the first question, the research process identified ten competencies that all occupational categories selected as “very” or “extremely important”. The researcher was able to conclude that interpersonal competencies including communication, relationship building, and trust are essential for frontline leadership. In response to the second question, two findings were suggested. The first finding, “An acting team leader development program should include knowledge and skills training, feedback, competency development, acting assignments and support” was asserted by most participants. The second finding, expressed itself both directly and indirectly, “Employees, overwhelmed by organizational change, are finding it hard to adapt.”

However, the recommendations that emerged from these findings must be seen from a systems perspective. The researcher is reminded that through using a systems lens, these recommendations interact and interrelate, often in an ambiguous manner, and do not enjoy any clearly defined linear causal relationship (Aronson, 1996). Therefore, the reader must keep these systems implications in mind when interpreting the following project recommendations.

Study Recommendations

1. Establish an acting team leader program that includes:

Program coordination

Select one actor and one back-up actor per team. The developing actors will be part of a pool that provides coverage to their own team in situations of less than 3 days and to the call centre of opportunities of greater than 3 days.

Participation in the program will be one year in length.

Developing acting team leader acting time will be jointly tracked by team leaders and managers.

Application process

Using the acting team leader profile as a tool, applicants will complete a self-assessment, provide examples of current performance and state learning goals.

Provide a letter of interest that describes openness to feedback and learning.

Selection process

Call centre managers and team specific team leader jointly select participants. Informal discussion, regarding the selection process, be provided to applicants upon request.

Learning plan with developmental focus available to all applicants.

The importance of trust and leadership development was stated in the discussion group, in anecdotal comments in the survey, and during the focus group. The discussion groups that were conducted in September emphasized that the program should ensure “consistency” and that actors should be “rotated”. A participant asserted, “there must be consistency in all aspects of the acting position for team leaders – i.e. selection, training, access, feedback, unit to unit, EI & ISP must follow the same rules” (Discussion Group, September 15, 2005). As for leadership

development, participants emphasized the potential for development and inclusive opportunity. The program would “Allow actors a chance to learn” and “Participation in a developmental program for 1 year allows more opportunities for others who are interested” (Focus Group, November 10, 2005).

Training and development

A reference manual will be created and provided for each actor and team.

A training program will be created and delivered that includes human resource management topics and tools and call centre harmonization and key performance indicators.

Participate in Learning Centre for Leadership course titled “Working with others”.

Learning-oriented feedback, assessment tools and practices, and adult learning and learning styles workshops will be created and delivered.

All research participants supported the development of a training program for acting team leaders. Participants in the September discussion groups said that there is a “Lack of human resource management training and key performance indicators”. The focus group said that they “like the training and everyone gets the same” (November 10, 2005). The Advisory Team, while examining questionnaire and focus group data asserted, “competencies should be included in the training program (December 12, 2005).

Perhaps the most innovative ideas that emerged from this research project were suggestions to support team leaders in their new role. A team leader on the Advisory Team stated, “It will be a change for team leaders to be involved in a more formal approach to actor development” (December 15, 2005). The researcher hopes the training will build trust and alleviate learner anxiety.

2. Arrange for all staff to participate in the Learning Centre for Leadership course, “Navigating Change”.

This recommendation is based on direct and indirect input from participants. It is becoming increasingly important for employees to be able to cope with change in the workplace. Involving employees increases job satisfaction and reduces stress (Kienzle, 1999).

3. Create and deliver a session that supports building trust during times of change. This may be an opportunity for joint union-management collaboration.

Throughout the research process participants asserted there was a need for greater “Communication, transparency, equity and fairness” (Pat Brand, personal communication, September 22, 2005). Two competencies, emphasizing the importance of trust and integrity, made it into the top ten. All participants said “Models and elicits trust” and “Takes ownership of own decisions” are very important.

“During times of organizational turmoil elevates the importance of trust. Trust has been defined as “...one party’s willingness to be vulnerable to another party based on the belief that the latter party is (a) competent, (b) open, (c) concerned, and (d) reliable” (Mishra, as cited in Kramer & Tyler, p. 265). “On an individual basis, truth and justice positively influence an employee in their assessment of the impact...” of the change (Mishra & Spreitzer, 1998).

4. Provide call centre harmonization and key performance indicators, human resource management topics and tools, learning oriented feedback and assessment tools and practices, and adult learning and learning styles sessions for all staff on a voluntary basis.

Making the workshops available to all staff will support current operational goals, increase trust, and openness to change. The literature advises that during times of change, managers and supervisors in formal organizations can increase trust by “communicating as an

equal, being open to discussion, and practicing empathic and supportive communication”

(Therkelsen & Fiebich, 2003; Willemyns, Gallois & Callan, 2003, p. 126).

5. Establish a joint call centre “merger team”.

The call centers are experiencing two levels of merging, one at the local level and one at the national level (Roger Lesage, personal communication, January 3, 2006). These feelings are not unusual, as employees in merging organizations often feel “plundered, exploited, and occupied. They frequently react with anxiety, paranoia, and hostility toward the other organization” (Trice & Beyer, 1993, p. 245).

The merger team, described in the literature as a revitalization team, is a mix of a cross-section of people drawn from all sectors. Their purpose is to examine each organization and map existing subcultures. Once the subcultures are identified, the process of how to bring subcultures together can start. (Deal & Kennedy, 1999; Schein, 2003).

6. Create an acting team leader competency profile using departmental tools and research data.

Early in the research process several participants said “There should be a list of competencies developed, and the candidates must satisfy this skill set in order to act” (Discussion Group, September 14, 2005). The researcher worked with the Advisory Team to create a questionnaire to gather input on acting team leader competencies. The questionnaire was successful in facilitating a dialogue of acting team leader competencies and will be used in conjunction with departmental competency profiles to finalize an acting team leader profile (Advisory Team Meeting, December 12, 2005).

Organizational Implications

The implementation of an acting team leader development program in the Vancouver call centres will require a collaborative effort by all stakeholders. Machiavelli (as cited by Kotter,

1999) offers a helpful perspective when he notes that “there is nothing more difficult to carry out or more dangerous to handle than to initiate a new order of things” (p. 29).

Kotter states that an effective change process contains the following elements: communication and education, participation and involvement, facilitation and support, and negotiation and agreement. The researcher will use Kotter’s model as a framework for this project’s implementation process.

The change process, as Kotter describes, should start with activities that support communication and education of the new initiative. The researcher suggests delivering presentations to the management teams, union management consultation committees, and individual teams. The presentations could include a summary of the research findings, conclusions, and recommendations.

Continued participation and involvement are important to get the program off the ground. The researcher suggests refocusing the Working Group and establishing a merger team. The Working Group’s purpose should be refocused from design, to the creation of training and learning materials as described in the recommendations. Participation should be voluntary and may require acquiring new members. The establishment of a merger team would involve employees from both call centres in the change initiative.

The importance of facilitation and support is critical to successful organizational change. The researcher used a facilitative process throughout this action research project and identified recommendations that integrate operational, learning, and support elements. After the implementation process is underway, it is important to “provide encouragement, support, and resources to keep supporters interested and to maintain the program” (Yukl, 2002, p.172).

Issues will have to be negotiated and agreed upon. The manager will be responsible for resolving union – management issues, responding to human resource policy requirements, and negotiating resources from national headquarters.

The importance of implementation can not be stressed enough. If nothing changes as a result of this study, employee trust will continue to erode. This will negatively impact the ability of the organizations to conduct future studies and introduce change initiatives.

Implications for Future Research

This research has clearly shown the importance of continuing the work of leadership development in federal call centre operations. Call centre team leaders, in addition to utilizing frontline management competencies, such as interpersonal skills, group leadership, coaching, and providing developmental feedback, must be able to coordinate task variety, debrief emotional dissonance, and communicate organizational resources to support agents. The new leadership challenge will be how to facilitate employee empowerment (Holman, 2003).

Issues of employee empowerment were not included in the research questions but participant data suggests that it is a barrier to organizational development and should be examined further. Call centre agents stated a number of times throughout the research that they felt it was necessary to have "...a body at the supervisor's desk" (September, 14, 2005). Many Advisory Team members asserted that this belief is incongruent with the nature of the work (Advisory Team Meeting, December 15, 2005). Recent call centre research on empowerment found that the empowerment dimensions of self-determination, personal consequence and meaningfulness seem to directly influence job satisfaction (Holdsworth & Carwright, 2002). A study of people who felt overworked concluded that if employees were to experience one or more of the empowerment dimensions, they will feel more energized and perceptions of

overwork may be lessened (Quinn, O'Neill & St. Clair, 2000). Further study is required to better understand how employee empowerment supports organizational development.

CHAPTER SIX: LESSONS LEARNED

When I first undertook this research project, I quite naively thought it was just a little bit bigger than other workplace projects I had completed. What I discovered, however, was that this project was quite different. I would like to share four learnings that helped me succeed. Some I planned, others emerged as I needed them. The two unplanned lessons were the importance of understanding organizational context, and how taking a brief sabbatical helped me see things in a more positive light and improved my analysis. Two practices I adopted from previous students were to utilize an advisory team and to keep a detailed journal.

I started out with the tidy goal of getting staff input to create a training program for acting supervisors, and along the way I realized I had to first understand the fuzzy and complex reality of organizational context and culture. Being new to this particular workplace presented both opportunities and challenges to understanding the culture of the Vancouver Call Centre. On the positive side, one of the best ways to learn about a particular culture is to initiate change. Further, being new I was not immersed in any particular subculture and could compare and contrast new experiences with previous events. The challenge I faced, was to be aware of my own bias as a result of previous “experiences, knowledge, (and) theoretical disposition...” (Glanz, 1999, p.157) and that I was seen as an outsider because I was new.

During my project I became quite passionate about organizational culture and change. Then I was reminded of Taylor’s Learning Cycle. Taylor’s Learning Cycle Model has a humanistic orientation, focusing on learning which is self-directed and involves a personal concern. The model encompasses four phases of learning and four transitions. The four phases are Disorientation, Exploration, Reorientation and Equilibrium. The Disorientation phase is characterized by a discomfoting event or destabilizing experience. As a result, the individual has

anxiety, increase tension and feels confused. The next phase is called the Exploration phase. To get out of the Disorientation phase and move successfully through the Exploration phase, one has to be able to name the central issue through interaction with others. The Reorientation phase is characterized by gaining insight, integrating ideas, experiences and gaining understanding of the issues. The Equilibrium phase is characterized by consolidating and elaborating, refining and applying another perspective. Clearly, understanding organizational culture was a “sensemaking” process for me (Weick, 1995).

The importance of understanding culture is a necessity asserts Schein. Schein (1995) advises leaders that “...the biggest danger you face is that you do not fully appreciate the depth and power of culture” (p. 185). Schein (1993) contends that leaders must “address and act on the maladapted elements” of culture in order to preserve the survival of the group. One element I became particularly interested in was the importance of trust. I am sure everyone would agree that “negative political behavior affects organizational processes...” and “...affects the organization’s functioning” (p. 6), but the competitive conditions facing organizations are increasingly dynamic and require adaptability. Quinn, O’Neill, and St. Clair assert that “Interpersonal trust permits flexibility in responding to dynamic conditions” (2000, pp.5-6).

Taking a three week sabbatical helped me examine my data, fully appreciating the complexity of my workplace. The sabbatical came at a good time, as I had completed my data gathering, but was starting to fall behind because of work demands. During my time off I analyzed my data, worked on my literature review, and designed a facilitation to lead my Advisory Team in an analysis of the data.

Incorporating an Advisory Team into my research process is an idea I adopted during the second residence. As I stated in my acknowledgements, my Advisory Team provided comradery

in what can sometimes be a lonely process. Another benefit of using an Advisory Team is that in preparing to meet with them, the researcher must examine and organize their data to be able to communicate it and facilitate an analysis. That is a great interim step to putting together the Major Project.

During the second residence I commenced a Major Project journal and was very diligent about writing in it at least weekly. It is excellent source for the Major Project and Formative and Summative assessments.

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APPENDIX A

Acting Team Leader Competency Questionnaire

1	Communication Cluster
2	Listens actively and sincerely.
3	Checks to make sure accurate mutual understanding during conversations.
4	Provides clear instructions and directions.
5	Chooses appropriate time and communication medium.
6	Chooses language appropriate to the person and circumstances that is consistent with the values of the organization.
7	Communicates effectively in writing.
8	Communicates important issues and information accurately and in a timely way.
9	Attentive to non-verbal cues.
10	Asks questions that elicit input.

11	Relationship Building
12	Consistently delivers what has been promised.
13	Answers questions honestly and maintains integrity.
14	Treats people fairly, without bias or favouritism.
15	Consistently promotes a positive work environment.
16	Seeks to understand, and respects the values and beliefs of others.
17	Gives team members constructive and supportive feedback about their performance.
18	Demonstrates care and concern about the welfare of others.
19	Remains objective and unbiased when resolving conflicting positions.
20	Interacts sensitively and respectfully with diverse individuals and groups.
21	Promotes an environment that is free of discrimination and harassment.

22	Action Management
23	Supports organizational changes required to achieve strategic priorities.
24	Identifies future challenges and prepares to meet them.
25	Sets goals and action plans.
26	Responds to change in a planned way.
27	Understands and participates in the implementation of the business plan.
28	Promotes best practices.
29	Works in a way that respects and considers partners.
30	Organizes time and tasks efficiently.
31	Collaborates with the work force manager in the capture, analysis, and utilization of operational data.
32	Understands, encourages and uses technology efficiently.
33	Manages resources effectively.
34	Understands, applies and evaluates the degree to which the service delivery is met.
35	Considers the impact of technology on the future of the call centre.
36	Assesses team needs, problems and potentials.
37	Shifts priorities and adapts work plans to reflect changes.
38	Facilitates creative problem solving and innovation.

39	Problem Solving
40	Makes reasoned decisions in a timely manner.
41	Addresses the source, not just the symptom, of problems.
42	Resolves problems using consultation and consensus, when appropriate.
43	Anticipates and manages problems and conflicts effectively.
44	Understands and applies established ethical standards.

45	Human Resource Management
46	Builds team morale and facilitates team motivation and

	achievement.
47	Models and elicits trust.
48	Models a confident and positive attitude.
49	Heeds early warning signals and advises the manager and others, as needed.
50	Manages compensation and benefits and employee leave, being aware of the collective agreement, federal legislation, regulations and policies.
51	Takes ownership of own decisions.
52	Demonstrates flexibility by adjusting readily to change in the work environment.
53	Establishes work-life balance by maintaining a well-rounded perspective on competing interests of self, family, social and work demands.
54	Models successful coping in stressful situations.
55	Adopts a continuous learning approach and works towards self-improvement.
56	Encourages mentoring opportunities.
57	Identifies employee training needs.
58	Instructs staff on tasks, goals, processes and performance standards.
59	Recognizes and acknowledges positive performance.
60	Ensures a meaningful performance evaluation process takes place.
61	Addresses below standard performance and directs improvement.
62	Approaches mistakes as learning opportunities.
63	Coaches without assuming control.
64	Counsels, mentors or coaches others towards higher performance levels.
65	Supports creativity and innovation.
66	Encourages contribution and participation by all members of the team.
67	Empowers other to assume leadership and responsibilities.

Appendix A

Team Leader Proposal – Focus Group

General Information

Select one actor and one back-up actor per team. The developing actors will be part of a pool that provides coverage to their own team in situations of less than 3 days and to the call centre coverage of greater than 3 days

Developing acting team leader acting time will be jointly tracked by team leaders and managers.

Developing actors will select a mentor from a list of available Team Leaders after the selection process is complete.

Participation in the program will be one year in length,

Application Process

Using the acting team leader profile as a tool, applicants will complete a self-assessment and provide examples of current performance and state learning goals.

Provide a letter of interest that describes openness to feedback and learning.

Selection

Call centre managers and team specific team leader jointly select participants.

Learning plan with a developmental focus available to all applicants.

Mandatory post board facilitated by team leader

Training and Development

Reference manual

Training program – Modified HR 101, key performance indicators, new leader orientation

Learning oriented feedback and assessment tools: Feedback, 360 degree feedback, learning agreements and portfolios

Workshops, tools and practices to support team leader as mentors: Learning oriented feedback, mentoring best practices and adult learning and leaning styles

Appendix B

Invitation to complete on-line survey

I would like to invite you to participate in a confidential and anonymous questionnaire that is part of my current research project at Royal Roads University, Master of Arts in Leadership and Training degree program. The primary focus of this project is to co-create strategies to support acting team leader development at the call centres. Wanda Hartry is my project sponsor.

The guiding purpose within this research project is the question “What behaviorally defined competencies are essential to acting team leader performance?” and “What interventions, programs or practices would support acting team leader development?”

The questionnaire is my principle method for collecting information regarding acting team leader competencies. The questionnaire was designed and piloted with the assistance of a call centre advisory team.

Prior to participating, everyone is asked to provide his or her consent. By completing and submitting the questionnaire, you will be deemed to have given your informed consent to participate. If you have any questions with respect to the confidentiality and/or anonymity of the questionnaire, please feel free to contact me at your earliest opportunity.

On October 17, 2005 you will receive e mailed instructions to log onto the on-line survey. There is no maximum time limit to complete the questionnaire but you should plan to spend as much as 20 minutes.

Your participation in this questionnaire will provide valuable information that will support both my research project and the goals and objective of the call centres. A copy of the final report will be housed at Royal Roads University and with the project sponsor. Thank you in advance for your assistance in this regard. Please do not hesitate to contact me at (XXX) XXX -XXXX if you have any questions regarding the questionnaire, the research project or the benefits to the call centres.

Sincerely,

Allison Crowell

Master's Degree candidate

Royal Roads University

Appendix B

Invitation to participate in a focus group

I would like to invite you to participate in a focus group that is part of my current research project at Royal Roads University, Master of Arts in Leadership and Training degree program.

The primary focus of this project is to co-create strategies to support acting team leader development at the call centres. Wanda Hartry is my project sponsor.

The guiding purpose within this research project is the question “What behaviorally defined competencies are essential to acting team leader performance?” and “What interventions, programs or practices would support acting team leader development?”

The focus group is one of my methods for collecting information regarding acting team interventions, programs or practices to support acting team leader development. The focus group was designed and piloted with the assistance of a call centre Advisory Team.

A random sample of approximately 2 to 3 people will be selected from each occupational grouping, including agents, acting team leaders, team leaders, managers and human resources specialists. Information will be recorded using a recorder and flipchart. At no time will specific comments be attributed to an individual. Prior to participating, everyone is asked to provide his or her written consent. After the session the researcher will transcribe the information and meet with the group again to verify the accuracy of the recording.

If you have any questions with respect to the confidentiality and/or anonymity of the questionnaire, please feel free to contact me at your earliest opportunity.

The focus group will be conducted November 3, 2005 in an on-site boardroom. The focus group will be approximately 2 hours in length.

Your participation in this focus group will provide valuable information that will support both my research project and the goals and objective of the call centres. A copy of the final report will be housed at Royal Roads University and with the project sponsor. Thank you in advance for your assistance in this regard. Please do not hesitate to contact me at (XXX) XXX - XXXX if you have any question regarding the questionnaire, the research project or the benefits to the call centres.

Sincerely,

Allison Crowell

Master's Degree candidate

Royal Roads University

Appendix B

Research Consent Form – On-line Survey

My name is Allison Crowell, and this research project, Leading Organizational Development Through Acting Team Leader Development, is part of the requirement for a Master of Arts in Leadership and Training degree at Royal Roads University. My credentials with Royal Roads University can be established by telephoning Dr. Nancy Greer at (XXX) XXX-XXXX ext. XXXX. The research will consist of this survey that is expected to take 15-20 minutes to complete and a focus group in November. The questions will ask you to rate the importance of specific competencies to acting team leader performance. The primary focus of this study is to create strategies to support acting team leader development at the call centres. A copy of the final report will be housed at Royal Roads University and will be publically accessible. The information you provide will be summarized, in anonymous format, in the body of the final report. At no time will specific comments be attributed to any individual. All documents will be kept strictly confidential. You are not compelled to participate in this research project. If you choose to participate, you are free to withdraw at any time without prejudice. Your completion of this survey will constitute informed consent. Thank you.

Appendix B

Research Consent Form – Focus Group

I would like to invite you to participate in a focus group that is part of my research project at Royal Roads University, Master of Arts in Leadership and Training degree program. E-mailing Dr. Nancy Greer at Royal Roads University can establish my credentials with Royal Roads University at XXXXXXXX.

This document constitutes an agreement to take part in a focus group, which is a component of the research project, the objective of which is to openly discuss and identify interventions, programs or practices to support acting team leader development.

As a Team Leader as have taken extra precautions to ensure that my staff and co-workers feel free to participate. Information will be recorded using a recorder and flipchart as well as informal note taking. The recorder, (), is committed to keeping everything heard during the focus group completely confidential. At no time will specific comments be attributed to an individual. After the session the researcher will transcribe the information and meet with the group again to verify the accuracy of the recording.

The focus group will take place on Thursday November 3, 2005 from 9am to 11:30am. Participation is voluntary and if an individual does not elect to take part, she/he is free to withdraw at any time with no prejudice. If an individual elects to not participate in the research, this information will also be maintained in confidence.

A copy of the final report will be housed at Royal Roads University and will be publically accessible.

By signing this letter, the individual gives free and informed consent to participating in this project.

Name: (Please Print) _____

Signed: _____

Date: _____