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Knowledge Management Assets Available to Mid-Level Managers During a Merger

Joy Nwulari Emole
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Walden University

College of Management and Technology

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Joy Nwulari Emole

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Walden University
2020

Abstract

Knowledge Management Assets Available to Mid-Level Managers During a Merger

by

Joy Nwulari Emole

Master of Philosophy in Management, Walden University, 2019

MBA Project Management, Walden University, 2014

BS Economics, Queen Mary University of London, 1996

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

Management

Walden University

August 2020

Abstract

The failure rate of mergers in the United States is high at over 70%. One of the contributing factors to merger failure is mid-level managers do not have sufficient strategies for knowledge management. The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-size information technology firms in California from 2014 to 2019. The conceptual framework was Nonaka and Takeuchi's 4 modes of knowledge conversion: socialization, externalization, internalization, and combination. Twelve mid-level managers working in California were recruited from LinkedIn to participate in the study. Data were collected using telephone interviews, and data were analyzed using Hycner's phenomenological data analysis process. Eight themes emerged: communication, training and development, employee retention strategy, organizational culture, knowledge transfer, information technology, trust, and management support. Findings may be used by mid-level managers to understand knowledge management in M&A, improve knowledge sharing, and sustain competitive advantage, leading to social change. The improvement of employee retention may assist with greater organizational stability by increasing employee job satisfaction and decreasing employee turnover.

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Dedication

This dissertation is dedicated to my wonderful family for their unconditional love and support. My husband, Dr. Murphy Emole; my daughter, Alice Emole; and my son, Ndem Emole, for their support, understanding, and encouragement. Not only did this dissertation require many personal sacrifices from my side, but also from my family's. Thank you from the bottom of my heart for making this journey such an enriching experience.

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Chapter 1: Introduction to the Study

Mergers and acquisitions (M&A) have become an inevitable standard of business operations among companies in the global economy. Since the merger wave emerged in 1897, most U.S. companies have either engaged in or have been affected by M&As to expand their organizations (Robert, Wallance, & Moles, 2003). Regardless of the expectation for financial growth, a low percentage of merger transactions have met company goals. Researchers provided evidence to confirm that more than 70% of mergers fail to meet a company's expectation due to the organization's lack of efficient analysis, due diligence, and synergy conflicts (Galping & Herndon, 2014). M&A processes are often applied in business practice, and one of the key motives is the transfer of new knowledge between the organizations. Knowledge has become the most important element that influences the development and success of organizations in the global economy (Miskiewicz, 2017). The key to preventing the loss of tacit knowledge is the successful identification, capturing, and sharing of tacit knowledge (Hodosi, Johansson, & Rusu, 2017).

Knowledge is an asset that organizations can use in highly competitive environments, and knowledge management is the main element of quality improvement, efficiency, and productivity in a merger (Sabherwal & Sabherwal, 2005). Organizational researchers and business writers have recognized the importance of knowledge as an asset to organizations (Drucker, 1998; Nonaka & Takeuchi, 1995). Effective management of knowledge creation and sharing can promote employee retention and innovation and contribute to organizational performance (J. Wang, Yang, Chen, & Tsai, 2016).

Knowledge may appear tacitly or explicitly within specific circumstances (Baghbanian, Torkfar, & Baghbanian, 2012). Explicit knowledge is formal knowledge that is written down and documented, whereas tacit knowledge is informal and resides in the minds of individuals as paradigms, mental models, know-how, and personal experience (McAdam, Mason, & McCrory, 2007). Nonaka and Takeuchi (1995), using Japanese companies as a model, argued that the key to Japanese business success is recognition of the importance of tacit knowledge. Nonaka and Takeuchi explained how Japanese organizations convert both tacit and explicit forms of knowledge into innovations in products and processes.

In the current qualitative descriptive phenomenological study, I aimed to understand the lived experiences of mid-level managers utilizing knowledge management assets in the retention of employees at a medium-size information technology firms in California. The results of this study may be significant to leaders, managers, and employees of organizations that are planning to merge or are in the process of merging. In Chapter 1, I provide a brief background of the research, problem statement, purpose statement, framework, assumptions, delimitations, and limitations.

Background of the Study

There are numerous obstacles for companies engaging in M&As. Mergers impact all levels of an organization and operating efficiency (Teerikangas, 2012). According to Hinescu (2014), the effect of mergers goes beyond the stakeholders, creditors, and third parties. A major reason for a merger is often the objective for gaining new knowledge from the acquired company and then transferring that knowledge among other parts of the organization (Bresman, Birkinshaw, & Nobel, 1999). Knowledge management is the

capturing, coding, or rendering of tangible and intangible knowledge into tacit or explicit knowledge (Nonaka & Takeuchi, 1995). In 2012, 30% of global companies focused on knowledge management practices or continuous learning by managers (Michels, Grijo, Machado, & Selig, 2012). Knowledge is an asset that corporations can utilize in highly competitive environments, and knowledge management is the main element of quality improvement, efficiency, and productivity (Bharadwaj, 2000). According to Spender and Grant (1996), the way knowledge is integrated within an organization can lead to unique capabilities that are prerequisites for a competitive advantage. Bresman et al. (1999) noted that the transfer of knowledge and its application involves many challenges. Employees of acquired firms often have positive and negative reactions because they do not know what role they will play, if any, in the new organization (Rafferty, 2007). Due to a lack of training and necessary skills mid-level managers should have for these transitions, employees can feel lost in the process (Taylor, Austin, & Caputo, 1992). According to Empson (2001), to understand the issues behind knowledge transfer, the key factor to be studied is the employees. If managers do not implement knowledge management within the organization effectively, employees may not have the opportunity to codify, transfer, or share their knowledge before they depart (T. T. Kim, Lee, Paek, & Lee, 2013). I found research on knowledge management and mergers, but there was a gap regarding the strategies information technology managers use to implement a knowledge management program.

The desired outcome of M&A requires retention of knowledgeable employees (Castro & Neira, 2005). Adomako, Gasor, and Danso (2013) observed that managers

continue to manage the employees through the merger; however, managers are often busy trying to understand the merger and what is expected of them. Marks and Mirvis (2001) noted that 3 out of 4 mergers fail to achieve their strategic objectives once a merger is announced. Managers are responsible for ensuring the employees are retained while the merger is taking place (Shaban, 2016). During the integration process, motivation of personnel is important to increase their willingness to share and absorb the transferred knowledge (Podgorski & Sherwood, 2015). According to J. Zhang, Ahammad, Tarba, Cooper, Glaister, and Wang (2015), managing employees' talent is one of the core issues during a merger process. Öberg and Tarba (2013) argued that the established social relationships between the acquiring and the acquired company can positively impact the transfer of knowledge. A manager needs to have the skills and tools to manage the employees through a merger (Shaban, 2016). Successful mergers include active manager involvement (Kelly, Cook, & Spitzer, 1999). It is also important the managers have some knowledge management assets to resolve cultural issues, ensure effective communication, and look after the employees (Podsiadlowiski, Groschke, Kogler, Springer, & Van Der Zee, 2013). Mid-level managers should have a full understanding of knowledge management and how to help in retaining their employees' tacit knowledge (Hau, Kim, Lee, & Kim, 2013). Mid-level managers have a responsibility in the creation and retention of tacit knowledge (Nonaka & Takeuchi, 1995).

Problem Statement

The failure rate of mergers in the United States is high at over 70% (Steynberg & Veldsman, 2011). One of the major contributing factors to merger failure is that mid-

level managers do not have sufficient strategies for knowledge management (Michels et al., 2012). The lack of strategies to develop and implement knowledge management threatens organizational performance, competitive advantage, and profits due to knowledge loss from departing employees (Massingham & Massingham, 2014). In 2012, 70% of global companies did not focus on knowledge management strategies for projects, which led to failed mergers (Marks & Mirvis, 2001; Michels et al., 2012). Knowledge management is defined as the capturing, codifying, or rendering of tangible and intangible knowledge into tacit or explicit knowledge (Nonaka & Takeuchi, 1995). Mid-level managers have knowledge management assets at their disposal, yet they are not being strategically used to assist in the development and implementation of knowledge management during a merger (James & Sankaran, 2006). Knowledge management assets are defined as conceptual, routine, experimental, and systemic firm specific resources, including stocks of knowledge (Chou & He, 2004; Nonaka & Takeuchi, 1995). The general management problem was that mid-level managers at medium-size information technology firms have awareness of available knowledge management assets but do not use such assets to integrate acquired employees during a merger (see Garcia & Coltre, 2017). The specific management problem was that mid-level managers may not have improved strategies to facilitate knowledge management assets during a merger (see Ouriques, Wnuk, Gorschek, & Svensson, 2019). Understanding mid-level managers experiences may help to establish strategies regarding knowledge management assets available to them during a merger and may increase the knowledge in the community of merger success and contribute to employee retention

(James & Sankaran, 2006). The improvement of employee retention may assist with greater organizational stability by increasing employee job satisfaction and decreasing employee turnover.

Purpose of the Study

The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-size information technology firms in California from 2014 to 2019. The results of this study may contribute to positive social change because mid-level managers may be able to understand the strategic uses of knowledge management assets that are necessary to share knowledge within their organizations.

Research Question

What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium-size information technology firms in California from 2014 to 2019?

Conceptual Framework

The conceptual framework for this study was Nonaka and Takeuchi's (1995) organizational knowledge creation and transfer. The framework offers four modes of knowledge conversion: socialization, externalization, internalization, and combination (SECI; Nonaka & Takeuchi, 1995). Nonaka and Takeuchi's framework suggests that knowledge is continuously converted and created as users practice, reflect, and learn. Nonaka and Takeuchi's (2000) SEIC model illustrates the knowledge management

process as the capturing, codifying, and rendering of tangible and intangible knowledge into tacit or explicit knowledge, as shown in Figure 1.

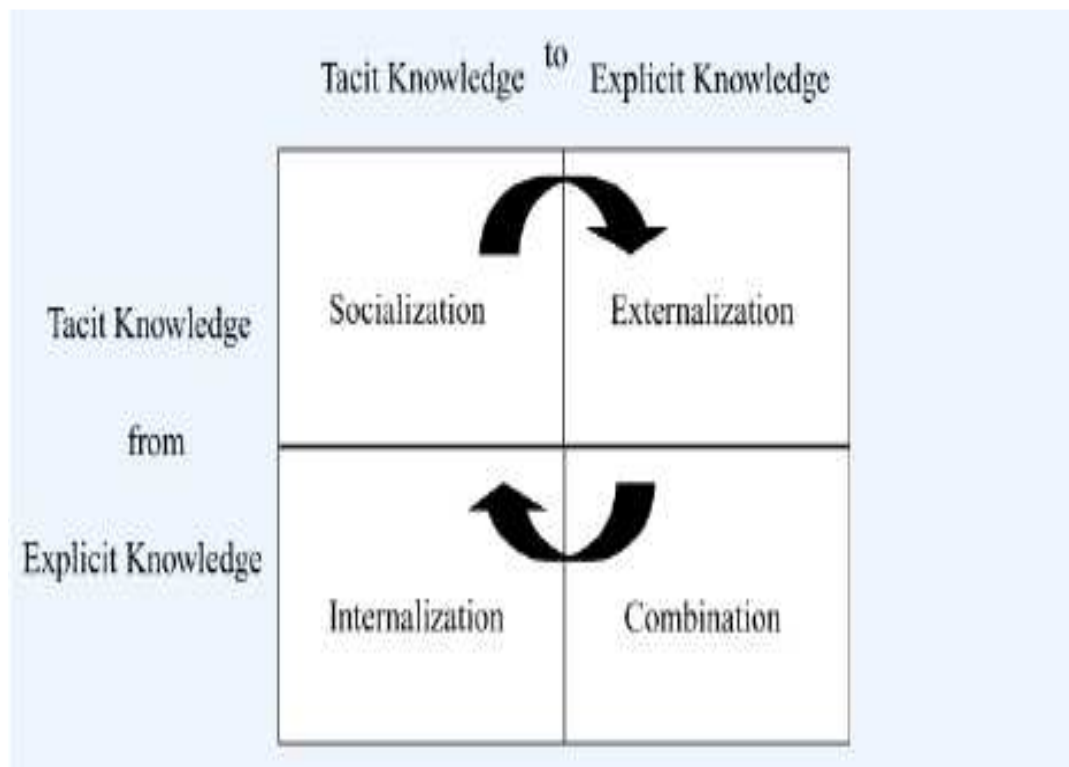


Figure 1. Four models of knowledge conversion (Nonaka and Takeuchi, 1995). Reprinted with permission.

Socialization is the sharing of tacit knowledge through observation, imitation, practice, experience, brainstorming, and collective sharing of ideas in a formal and informal setting (Nonaka & Takeuchi, 1995). Socialization begins with building a space of social interaction so that the practiced skills become part of the existing knowledge with the organization (Nonaka & Takeuchi, 1995). Externalization is the interchange of tacit knowledge to explicit knowledge (Nonaka & Takeuchi, 1995). In externalization, formal knowledge is maintained in manuals, audio files, and documents (Nonaka & Takeuchi, 1995). Externalization means ensuring the availability of tacit knowledge to

other members of an organization (Nonaka & Takeuchi, 1995). Internalization is the conversion of explicit knowledge to tacit knowledge (Nonaka & Takeuchi, 1995).

Nonaka and Takeuchi (1995) noted that “documentation helps individuals internalize what they experienced, thus enriching their tacit knowledge” (p. 69). Internalization means learning by doing (Nonaka & Takeuchi, 1995). Combination is the interchange of explicit knowledge to explicit knowledge (Nonaka & Takeuchi, 1995). Combination means combining various types and forms of formal knowledge/explicit knowledge to generate new formal knowledge (Nonaka & Takeuchi, 1995).

Nonaka & Takeuchi (1995) defined this continuous process of knowledge creation among these four patterns as the knowledge spiral. Tacit knowledge is defined as individual experienced-based knowledge that is difficult to share, transfer, and communicate from one individual to another (Nonaka & Takeuchi, 1995). Explicit knowledge is defined as knowledge that is easy to share from person to person, or codified knowledge that is stored, documented, or captured in the form of books (Nonaka & Takeuchi, 1995). The transfer from tacit to explicit knowledge is more important than any other dimension for learning purposes (Herschel, Nemati, & Steiger, 2003). All four modes of knowledge conversion have to be satisfied to achieve successful knowledge conversion within and across the organization (Nonaka & Takeuchi, 1995).

I chose the Nonaka and Takeuchi organizational framework as the foundation for this study because the framework of knowledge creation and transfer aligned with my study by addressing the need for continuous social interaction of knowledge. Knowledge management, knowledge sharing, and knowledge transfer are important resolutions to the

business problem as methods for increasing the competitive advantage and organization sustainability. Organizational leaders should establish strategies for effective knowledge management practices (M. Kim, Song, & Triche, 2015). By using knowledge management systems, leaders and employees can collaborate and share knowledge to promote the overall success of the organization (Z. Wang, Wang, & Liang, 2014). The Nonaka and Takeuchi framework provided a way of understanding knowledge management and how mid-level managers understand knowledge management at each stage. The framework allows tacit knowledge to be captured through socialization (tacit to tacit), and in some cases employees' knowledge can be converted from tacit to explicit knowledge through externalization (Nonaka & Takeuchi, 1995). Nonaka and Takeuchi's (1995) framework aligned with my research question because it depicted the relationship among the constructs of the role of the manager, tacit knowledge, and explicit knowledge in the knowledge conversion process. Nonaka and Takeuchi's framework has been shown to bridge the gap between different levels of management. The best management style is neither bottom-up nor top-down, but middle-up-down where middle managers bridge the gap between top and bottom levels (Capello, 2013).

Nature of the Study

I used qualitative methodology. Qualitative methodology is appropriate to use when the researcher seeks to understand a phenomenon (Mukhopadhyay & Gupta, 2014). According to Mariotto, Pinto-Zanni, & De Moraes (2014), qualitative research provides rich data and a detailed picture a researcher can use to explain why individuals act in a certain way and how they feel about these actions. Qualitative methodology was

appropriate for my study because I aimed to understand the merger-related knowledge management resources used by mid-level managers to improve knowledge sharing at recently merged, medium-size information technology firms in California.

I used a phenomenological descriptive design, also known as the transcendental or classical approach. According to Giorgi (2012), the transcendental phenomenological design is used to obtain in-depth descriptions of a phenomenon through interviews of several individuals who have experienced the phenomenon. A phenomenological design allows the researcher to focus on people's experience regarding a situation or how these individuals interpret such experiences (Englander, 2016). The purpose of phenomenological research is to use perception or memory (Sokolowski, 2000) as a primary source of information to examine the ways in which people experience and understand the world when facing different phenomena (Moustakas, 1994). The collected data in a phenomenological study are used to gain a comprehensive account of the phenomenon. All these features made the phenomenological design appropriate for my study.

The targeted population for my research was mid-level managers who managed employees during a merger and who were over 18 years of age. The geographic location of my participants was California in United States. The sample size of 12 allowed me to reach data saturation in the study. The study was conducted by critical processes of bracketing, epoché, phenomenological reduction, and synthesis (see Giorgi, 2012). The phone interviews were audio-recorded, and validation of interview responses occurred through transcript verification. After all interview data transcription, the interview

transcripts were exported to NVivo software for analysis. I used the Hycner's (1985) phenomenological data analysis process. The Hycner data analysis process includes: (a) bracketing and phenomenological reduction, (b) delineating units of meaning, (c) clustering of units of meaning to form themes, (d) summarizing each interview and validating and modifying it where necessary, and (e) extracting general and unique themes from all the interviews and making a composite summary.

Definitions

To facilitate understanding of the study, I defined the merger, knowledge management, and assets terms as follows:

Acquisitions: An organization legally and financially obtaining another organization (Rau & Stouraitis, 2011).

Explicit knowledge: Formal knowledge that is written down and documented (McAdam et al., 2007). Explicit knowledge is knowledge that is easy to share from person to person (Li & Edwards, 2014; Nonaka & Takeuchi, 1995).

Integration: The interactive process in which employees from companies involved in a merger learn to work together to handover each company's plans (Alaranta & Parvinen, 2004).

Knowledge assets: "Anything valued without physical dimensions that is embedded in people or derived from processes, systems and the culture associated with an organization" (Bukowitz, Williams, & Mactas, 2004, p. 2).

Knowledge creation: "Interaction between explicit knowledge and tacit knowledge" (Nonaka, Toyama, & Konno, 2000, p. 16).

Knowledge management: An organizational practice that makes better use of what people in the organization know (Spender, 2008). The process through which knowledge is captured, developed, shared, and used within an organization.

Knowledge sharing: The trading of tacit and explicit knowledge between individuals to gain a better perspective on processes, procedures, and products whereby individuals can generate new knowledge (Peralta & Saldanha, 2014)

Knowledge transfer: The process by which explicit or tacit knowledge possessed by one person is shared with another individual where the knowledge is internalized or indwelled (Burnett, Williams, & Grinnall, 2013).

Leadership: A role within an organization that has traits, characteristics, and behaviors to help others focus on a clear vision and collaborate (Avolio, Gardner, Walumbwa, Luthans, & May, 2004).

Merger: Two or more companies combining (Aktas, De Bodt, & Roll, 2013).

Organizational culture: The set of underlying beliefs, which are rarely articulated directly, but which influence employees' perceptions of communications and actions (Armstrong, 2009).

Phenomenology: An approach that focuses on human experiences provided by participants in the research study (Groenewald, 2004). The central goal of this approach is to define the meaning of the subjects' lived experiences (Groenewald, 2004).

Tacit knowledge: Knowledge that is hard to share because it derives directly from individuals' experiences (Li & Edwards, 2014). Tacit knowledge is informal and resides

in the minds of individuals as paradigms, mental modes, know-how, and personal experience (McAdam et al., 2007).

Assumptions

Assumptions are thoughts, concepts, and ideas taken to be true but can not be proved, and are beyond the control of the researcher (Gallop, 2011). Assumptions are a way to decrease bias and identify any prior actions that may have an influence on the research (Marshall & Rossman, 2014). Researchers use assumptions to shape the research endeavor, from the methodology employed to the type of questions asked (Hathaway, 1995). I made five assumptions for this study. The first assumption was that there would be access to mid-level managers who have experienced the same or similar phenomenon of the study. The second assumption was that each interviewee would agree to be a central part of this study and would engage and answer the interview questions truthfully and candidly. The third assumption was that the interviews would offer an opportunity to explore common themes involving knowledge management assets during a merger. The fourth assumption was that the participants would have a sincere interest in participating and would provide rich, detailed experiences of the phenomenon. The final assumption was that the literature review would provide accurate information to identify the gap in the literature for this qualitative study.

Scope and Delimitations

The scope of a study addresses the parameters of the exploration. The scope of the current study was the lived experiences of mid-level managers in California during a merger. The scope included managers in organizations that had already gone through the

merger process. There had been an increase in merger activities in the years prior to the study, so there were multiple organizations from which to recruit participants.

The delimitations define the boundaries for the scope of a study (Suri, 2011). In this study, I focused on a participant sample of 15 mid-level managers above the age of 18 in California who had participated in a merger. The reason for selecting mid-level managers was because of their comprehensive knowledge and experience with M&As. When recruiting participants for this study, I did not consider demographic characteristics such as ethnic background, religious affiliation, financial status, and sexual orientation because these data would not have added value to the results. This research was also delimited by my choice of research design, research question, and interview questions. The delimitations allowed me to explore the research question thoroughly and obtain a rich description of the lived experiences of mid-level managers who had been through a merger. Because the phenomenological tradition demands that the researcher suspend or bracket their assumptions and biases so that the informants may drive the research (M. Miles, Huberman, & Saldana, 2014), the study's results were confirmed by using transcript verification.

Limitations

Limitations of a study show probable weaknesses and an understanding of where the results of the study may not be relevant (Anosike, Ehrich, & Ahmed, 2012). In qualitative research, issues of credibility (Fusch & Ness, 2015) and dependability (Houghton, Casey, Shaw, & Murphy, 2013) are considered limitations. Credibility refers to the actual and factual responses of participants, while dependability refers to the

accuracy of transcribed responses from the participants. This study was subject to several limitations relating to the research design and the resources needed for this study. The first limitation was that the participants might have provided a biased view rather than an objective description of the phenomenon. To address this limitation, I informed the participants about the aims of the research and that there were no right or wrong answers to the interview questions. The second limitation was researcher bias. I had experience with mergers in the Silicon Valley, but I planned to maintain an open mind and not let my personal experience get in the way of the data collected.

Significance of the Study

The outcome of this study may be beneficial to management practitioners because this research may contribute to the understanding of knowledge management assets available to managers to ensure the success of managing employees through a merger. This study may be significant because it may provide additional knowledge to managers, business leaders, and employees of companies that are planning a merger. The findings from this study may lend important information to civic groups and increase employee retention through a merger process. The factors leading to positive outcomes may serve as a guide for business managers and organizations seeking to promote good merger and acquisition practices, thereby facilitating successful knowledge management implementation.

Significance to Theory

The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level

managers in the retention of employees at recently merged medium-size information technology firms in California from 2014 to 2019. The findings from the study may also motivate mid-level managers to use the conceptual foundation to utilize the knowledge management assets available to them during mergers. This study may benefit firms that tend to expand in new markets or areas that have a greater potential of providing the returns on investments (see Nayak, Acharya, & Mohanty, 2016). This study may also illustrate the effectiveness of incorporating the Nonaka and Takeuchi conceptual framework into organizational policies to improve mergers.

Significance to Practice

This research may contribute to business practice and business knowledge. The results of this study may lead to updated training for mid-level managers to integrate the knowledge management asset aspect of the merger process. This qualitative phenomenological descriptive study may contribute to business practice and business knowledge by helping managers enhance business performance through revenues and a sustainable business environment (see Panda, Karve, & Mohapatra, 2014). Knowledge intensive managers in businesses seeking to implement knowledge management may use the findings, conclusions, and recommendations from this study to provide a knowledge infrastructure to help retain, transfer, and capture critical knowledge of employees before they retire (Joe, Yoong, & Patel, 2013). The study findings may also add to the body of knowledge related to knowledge management and fill gaps about the importance of knowledge management assets to an organization and the influence that implementation has on business. Organizations may experience increases in social capital, innovation,

and creativity as well as improvements in the workplace (see Liu, 2013). This study may also be useful for managers to become more effective in managing a diverse workforce and addressing employees' needs. The findings may be significant for leaders, managers, and employees of firms that are planning to merge or are in the process of merging. Business leaders may benefit from this study by improved competitive advantage, increased innovation, improved organizational performance, reduced duplication of effort, increased automation of business processes, and increased returns from financial investment (see Massingham, 2014).

Significance to Social Change

Organizations that accept, use, and adopt a successful knowledge management program may generate an organizational culture of knowledge sharing and knowledge capturing (see Z. Zhang, Lee, Huang, & Huang, 2005). The results of this study may offer a significant contribution to positive social change on an individual, community, and practitioner level. Merger failures have multiple negative consequences that affect the stakeholders, managers, and employees (Angwin & Meadows, 2015). Understanding the knowledge management assets available to mid-level managers may increase the awareness of management by providing strategies for successfully managing employees during a merger. Employees' retention may assist with greater organizational stability by increasing job satisfaction and decreasing employee turnover. Employees who feel their needs are met may be loyal to the management and contribute to the success of the merger. Satisfied employees may contribute to the success of the organization by ensuring customers are satisfied and return for future service. Understanding the

knowledge management assets available to managers during a merger may increase the knowledge in the field of leadership.

Summary and Transition

In Chapter 1 I introduced the study, outlined its background, stated the research problem, and explained the nature and significance of the study and its conceptual framework. The research question was presented with the problem statement and purpose statement. Definitions were provided for key terms, assumptions were explained to justify why the expected outcome of the study was possible, and limitations were presented to explain why the sample was selected.

Chapter 2 presents a detailed review of relevant literature. I draw on key concepts of knowledge management, with particular attention on the knowledge creation model of Nonaka and Takeuchi. I review literature and publications relevant to management, organizational culture, information technology infrastructure, knowledge management, employee involvement, teamwork, and employee empowerment to broaden the understanding of knowledge management of a merger. I also review the history of merger waves in the United States.

Chapter 2: Literature Review

The merger and acquisition failure rate among all companies is high at over 70% (Steynberg & Veldsman, 2011). In the United States, 87% of mergers fall below expectations or fail (Nalbantian, Guzzo, Kieffer, & Doherty, 2005). One of the major contributing factors to merger failure is the loss of valuable tacit knowledge, and mid-level managers do not have enough strategies for knowledge management (Michels et al., 2012). The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-size information technology firms in California from 2014 to 2019. I examined the strategies, patterns, and themes that emerged from the lived experiences of mid-level managers who led merger transactions in California. The conceptual framework for this study was the Nonaka and Takeuchi (1995) organizational knowledge creation and transfer. The framework offers four modes of knowledge conversion: socialization, externalization, collaboration, and internalization (Nonaka & Takeuchi, 1995).

In Chapter 2 I present the literature search strategy and the conceptual framework on which this study was based. I examine existing literature to highlight the historical perspective of mergers, knowledge management assets, organizational culture, information technology, and employee retention in California. Chapter 2 contains the literature review and the inferences for the framework originated from secondary sources, which included books, peer-reviewed journals, articles and relevant studies. According to Hart (1989), a researcher should know the work and contributions others have made to

the knowledge pool relevant to their topic. Chapter 2 concludes with a summary and a transition to Chapter 3.

Literature Search Strategy

The literature that I reviewed for this qualitative research was from Google Scholar, peer-reviewed journal articles, Sage, EBSCO Host, and ProQuest. To gain a historical context, the key search terms used *were mergers, merger history, merger failure, merger success, employee mergers, mid-level managers, employee retention, effective leadership, integration, leadership, knowledge management, knowledge assets, explicit knowledge, knowledge conversion, knowledge creation, knowledge dynamics, knowledge sharing, tacit knowledge, organizational knowledge, workplace learning, organizational knowledge and mergers, and new knowledge creation*. Peer-reviewed journals published within the last 5 years provided the literature for my review. Other journals that were significant to the study guided me in understanding the historical failure of mergers. These key search terms were also combined to determine whether more relevant results could be identified. The keywords were searched to ensure saturation of information.

Conceptual Framework

The conceptual framework for this study was the Nonaka and Takeuchi (1995) organizational knowledge creation framework. Nonaka and Takeuchi in their study of Japanese companies identified four processes of knowledge creation that produce success in a collaborative setting: socialization, externalization, internalization and combination (Nonaka & Takeuchi, 1995). Nonaka and Takeuchi defined knowledge as “the set of

justified beliefs that enhance an entity's capability for effective action" (p. 51).

Knowledge is regarded as the core competency of an organization to grow and compete with their rivals (Ceptureanu, 2016). Love, Roper, and Zhou (2016) defined knowledge as the experience obtained from performance that allows individuals to describe, arrange, shape, and learn to solve a problem or improve a situation. Knowledge creation begins with the individual (Scott, 1998). Making individual knowledge available to others within the organization is the quintessence of the knowledge-based model (S. Ceptureanu, Ceptureanu, Olaru, & Popescu, 2018). The development of organizational knowledge represents a process by which the knowledge created by individuals is widely disseminated at the organizational level and incorporated in the network of knowledge of the organization (Ceptureanu, 2015). Nonaka and Takeuchi's knowledge management model is premised on three assumptions:

- Knowledge that is created at an individual level is the result of constant dialogue between explicit and tacit knowledge.
- There are four basic processes of knowledge conversion: socialization, externalization, combination, and internalization.
- Within an organizational setting, knowledge creation is based on a spiral diving force and can be created from these four processes.

The Nonaka and Takeuchi framework aligned with my research question because knowledge is continuously converted and created as users practice, reflect, and learn. Nonaka and Takeuchi (1995) considered two dimensions in the process of knowledge creation in organizations: the ontological knowledge creation dimension and

epistemological knowledge creation dimension. The ontological dimension is the conversion of knowledge from individual knowledge into group knowledge and the transformation of the group knowledge into organizational knowledge (Bratianu, 2014). The epistemological dimension is the conversion of knowledge from tacit knowledge into explicit knowledge and from explicit knowledge into tacit knowledge (Bratianu, 2014). With the combination of these two dimensions, Nonaka and Takeuchi developed a spiral model for knowledge creation and transfer. Figure 2 shows how different dimensions of Nonaka and Takeuchi's knowledge conversion model can move between different domains. The Nonaka and Takeuchi model of organizational knowledge creation and transfer aligned with my research question because it identified four ways of conversion of individual knowledge, which represent the essence of the process of generating organizational knowledge.

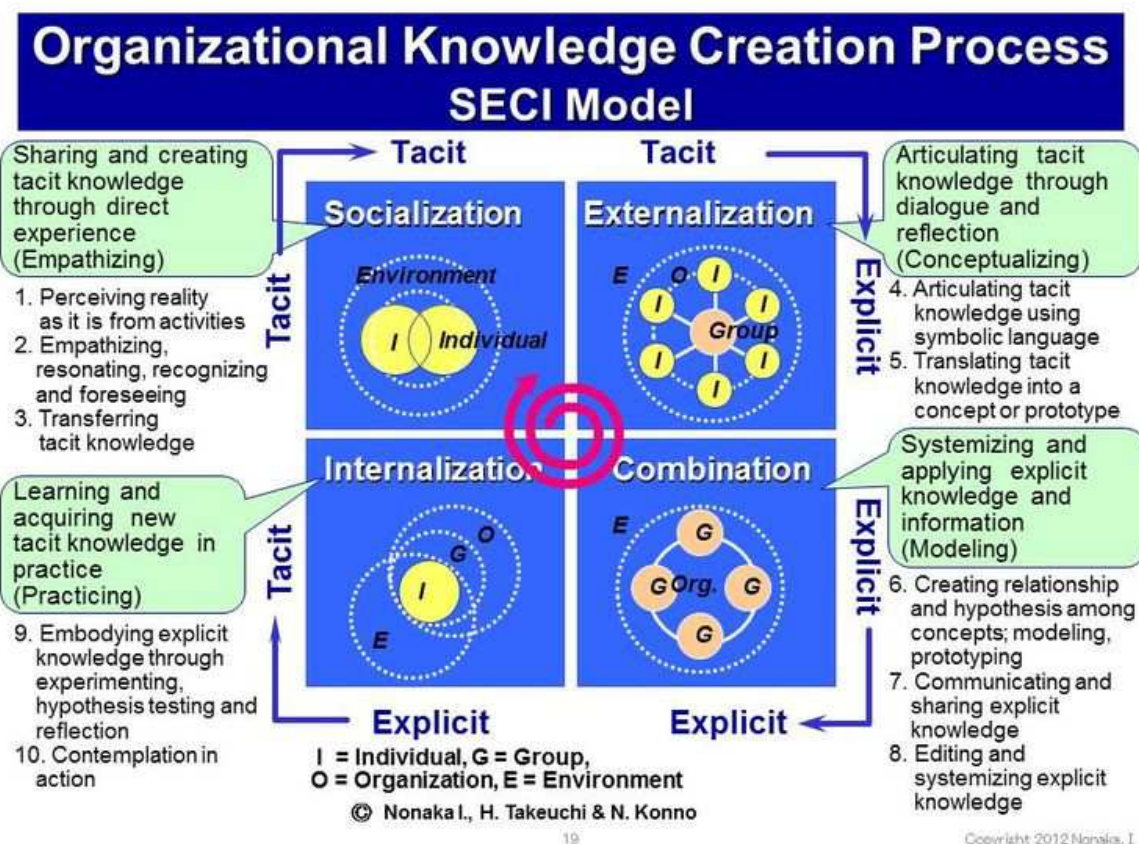


Figure 2. A diagram showing the knowledge conversion in Nonaka and Takeuchi's model. Source: Nonaka & Takeuchi, 1995, p.19. Reprinted with permission.

Socialization

Socialization requires the sharing of experiences and the creation of tacit knowledge in the form of technical skills or knowledge structures that enable the formation of accurate explanations, the coordination of actions, and the adaptation of behavior (Cannon-Bowers, Salas, & Converse, 1993). The term socialization means that tacit knowledge is exchanged through joint activities and generated by direct experience such as observing, imitation, practice, experience, brainstorming, and collective sharing of ideas in a formal and informal setting, team interaction mentoring, collaboration, and

in the same environment rather than through written or verbal instructions (Nonaka & Takeuchi, 1995). Socialization not only brings new employees into an organization's culture, but also continues throughout their career (Matteson & Ivancevich, 1990). Socialization begins with building a space of social interaction so that the practiced skills become part of the existing knowledge with the organization.

Externalization

Externalization is the process of transforming tacit knowledge into explicit knowledge (Nonaka & Takeuchi, 1995). In externalization, formal knowledge is maintained in manuals, audio files, and documents. Externalization is the creation of new concepts, ideas, and common goals through publishing and articulating knowledge (Cannatelli, Smith, Giudici, Jones, & Conger, 2017). Externalization, which is typically seen in concept creation, is triggered by dialogue and collective reflection. In externalization, conversation management is an important knowledge enabler; not only does it influence the sharing of tacit knowledge, it also influences every phase of the knowledge creation process (Von Krogh, Ichijo, & Nonaka, 2000).

Combination

Combination involves the conversion of explicit knowledge to explicit knowledge through organizing and integrating knowledge and the creative use of computerized communications and large-scale databases (Bratianu, 2014). In practice, combination relies on three processes. First, explicit knowledge is collected from inside or outside the organization and then combined. Second, the new explicit knowledge is disseminated among the organizational members. Third, explicit knowledge is edited or processed in

the organization to make it more usable (Nonaka & Toyama, 2015). Such knowledge can be obtained from outside or inside the organization and then combined and edited to create new knowledge (Nonaka, 1998).

Internalization

Internalization is the process of embodying explicit knowledge as tacit knowledge (Nonaka, 1998). Through internalization, the created explicit knowledge is shared throughout an organization, and this refers to the process of receiving knowledge and reflecting on one's ability (Chugh & Joshi, 2016). The accumulation of tacit knowledge at the individual level can then set off a new spiral of knowledge creation when it is shared with others through socialization. The internalization process denotes learning by doing (Akbar, 2003; Nonaka et al., 2001) despite criticisms that this assumes an unproblematic process of absorbing the existing knowledge and neglects the nature of the learner of their relations unexplored (Newell, 1999). The internalization of knowledge is continuously enhanced using formal knowledge (explicit) in real life.

Nonaka and Takeuchi's model enabled organizations to work with their knowledge structure and improve their competitive edge through innovation strategies and product designs, lower cost, and better quality (Sarayreh, Mardawi, & Dmour, 2012). Nonaka and Takeuchi's model enhances the ability of management to make the most out of the knowledge structure in their organization to make improvements. Some of the benefits of the model include better knowledge creation, improvement in cost structures, employee retention, workforce management, and business sustainability (Nonaka et al,

2014). Unlike other complex models, Nonaka and Takeuchi's model provides a coherent combination of effective modes of knowledge creation (Nejatian, Zarei, & Soltani, 2013).

Criticism of Nonaka and Takeuchi's Model:–Knowledge Conversion Research

Nonaka and Takeuchi's (1995) model enhances the utility of management to make the most out of the knowledge structure in their organization and make various kinds of improvements. Nonaka and Takeuchi's model are clear and rigorous, allowing management to identify and remove anomalies in the business structure. Although several theorists argued that managers play an active role in the conversion of tacit to explicit process (Nonaka & Takeuchi, 1995), little empirical research has addressed managerial roles in this process. Polanyi (1966) coined the types of organizational knowledge as tacit and explicit. Polanyi's work laid the foundation for the social collaborative aspects and the codification classification aspects of the knowledge conversion process.

A review of current literature about the conversion of tacit knowledge to explicit knowledge indicated that the role of the manager in this process had been overlooked. The manager must implement the organization's knowledge management strategy in a merger, the manager makes choices regarding which knowledge to convert and transfer, and the manager must convince individual workers that certain knowledge has value beyond that which is exchanged between two employees (Nonaka & Takeuchi, 1995). Nonaka and Takeuchi's (1995) model aligned with my research question because it depicts the relationship among the constructs of the role of the manager, tacit knowledge, and explicit knowledge in the knowledge conversion process. Both the framework and research question dealt with middle managers as a bridge between the visionary ideas of

the top and the reality of those on the front line of business. Middle managers mediate between the “what should be” mindset of the top and the “what is” mindset of the front-line employees by creating mid-level business and product concepts (Nonaka & Takeuchi, 1995).

Knowledge Management Authors

As organizations confront increasingly more complex global competition and mergers, they must be able to assess their respective environments and change to meet the demands of those environments. In the battle between tacit and explicit knowledge, where theorists most often align themselves in one of the two camps, the most successful approach to knowledge valuation may be to acknowledge that organizational knowledge can be tacit or explicit, or both at the same time.

As the field of knowledge conversion began to take shape, several organizational theorists published works that provided a framework in which to study the field. Michael Polanyi (1966) coined the types of organizational knowledge as tacit and explicit. According to Polanyi (1966), tacit knowledge resides in the minds of individual employees and communities of practice. Polanyi (1966) noted that tacit knowledge has many intangible aspects; it is hard to define, communicate, or codify. Tacit knowledge conversion depends upon the ability of highly trained staff to demonstrate the knowledge to new employees. On the opposite end of the spectrum is explicit knowledge. Explicit knowledge is a more traditional, formalized knowledge codified in manuals, procedure and process documents, and written reports (Nelson & Winter, 1982; Polanyi, 1966; Winter & Zolio, 2001). Explicit knowledge is easily portable in that it can be transferred

readily from one place to the next, from one person to the next. Polanyi's (1966) study lays the foundation for both the social, collaborative aspects and the codification, classification aspects of the knowledge conversion process. Although Polanyi's (1966) research uses an individual level of analysis, most organizational theorists assume that his concepts hold true at the organizational level as well. Empirical evidence to support Polanyi's position is limited. In the Nonaka and Takeuchi's (1995) model as noted previously, employees within the organization transform tacit knowledge into explicit knowledge through this dynamic process. The larger question for Nonaka and Takeuchi is not whether knowledge is tacit or explicit (because in their view it can be both) but how the knowledge is to be used within the organization.

Spender (1995) built on the concept of tacit and explicit knowledge by establishing a relationship between individual and social knowledge. In his study, social knowledge is organizational knowledge. Each knowledge type can be further divided as either conscious knowledge or automatic knowledge. Spender (1995) asserted that organizational knowledge has a cultural dimension in that social knowledge is heavily influenced by the shared values, beliefs, and assumptions of the organization. Taylor and Van Every (2000) contribute to the knowledge management literature by asserting that organizational knowledge is created through the structuring of language and action. In their study, tacit and explicit knowledge became conversation and text. The space that exists between these two constructs is where organization emerges. The dialectic nature of conversation and text are mutually reinforcing. From the perspective of the study, the conversion process of tacit to explicit knowledge involves codification. Only through

codification can tacit knowledge become explicit (Nonaka & Takeuchi, 1995). In this way, the codification process is seen primarily as language. In current literature, knowledge management with emphasis on knowledge conversion, transfer, and creation has been studied as a phenomenon (Brown & Duguid, 2000; Connor & Prahalad, 1996; Nonaka & Takeuchi, 1995; Spender & Robert, 1996) and as a means to innovation and competitive advantage (Moreland, Argote, & Krishnan, 1996). Most theorists agree that information and data are the antecedents to knowledge, whether the knowledge is tacit or explicit. Tacit knowledge as a construct is derived from literature on knowledge typology (Kogut & Zander, 1992, 1996; Lyles & Schwenk, 1992; Polanyi, 1996; Sackmann, 1992) and in communities of practice (Barley, 1986; Brown & Duguid, 2000; Lave, 1998; Lave & Wenger, 1991).

Literature Review

In current literature, knowledge management with emphasis on knowledge conversion, transfer, and creation has been studied as a phenomenon (Brown & Duguid, 2000; Nonaka & Takeuchi, 1995; Spender & Robert, 1996) and as a means to innovation and competitive advantage (Stewart, 1997). Most theorists agree that information and data are the antecedents to knowledge, whether the knowledge is tacit or explicit. Tacit knowledge as a construct is derived from literature on knowledge typology (Kogut & Zander, 1996; Polanyi, 1996; Sackmann, 1992) and in communities of practice (Lave & Wenger, 1991). The review of literature encompasses a systematic review of the content and quality of knowledge already available and presents the reader the significance of

previous work of published and unpublished studies relating to a subject area (Ramsaroop & Ramdhani, 2014).

Mergers

M & A is commonly used as a strategic tool to access new knowledge (Barney, 1991). Knowledge management in M&As involves not only the exchange of information, but also substantial organizational learning process (Geppert & Clark, 2003). To understand the concept of mergers and acquisitions, this section will expand on the history of mergers. Mergers allow two corporations to integrate and share resources, resulting in a larger corporation with a greater opportunity to expand their business. A merger is defined as the act of two organizations combining to form one organization (Jewoo & Tianshu, 2014). According to DePamphilis, (2011), a merger is defined as a combination of two corporations in which only one corporation survives, and the merged corporation goes out of existence. Vazirani (2015), defines a merger as a circumstance where a company, including all assets, liabilities, and people merge with another company. A merger leads to the combination of two or more corporations in which all, but one legally ceases to exist can have both positive and negative.

Historical Development of Mergers

Mergers and acquisitions are a combination consummated with a framework for integration significant resources, operations, and technology (Lajoux, 2006). Mergers and acquisitions are transactions that combine and possibly integrate two organizations. Business managers use mergers and acquisitions to improve operational efficiency and

performance, access foreign market, expand, increase revenue growth, and obtain new technology (Nalbantian, Guzzo, Kieffer, & Doherty, 2005).

Gaughan (1998) indicated that there are five dominant merger waves which characterized the history of mergers. Merger waves have many effects on the organizational outcomes, and it is important to understand the changes managers and employees go through that allow the corporation to grow within the current market, expand into another market, or do both. “These periods were characterized by cyclic activity, that is, high levels of mergers followed by periods of relatively fewer mergers” (Gaughan, 2010, p 29). In addition, Gaughan (1998) described how the European Union’s economy and industry have been dramatically influenced by the prominent merger waves of the United States. Gaughan (2002) described the five waves as instrumental, “They were instrumental in transforming U.S. industry from a collection of small and medium-sized businesses to the current state” (p. 29). These waves were influenced by economic, technological, financial and legislative factors. In particular, it has been shown that each merger wave is positively correlated to economic prosperity. The first merger wave consisted of horizontal combinations, whereas mergers in the second wave were mostly of a vertically integrated nature (Gaughan, 2010). The third merger wave was the “conglomerate era”. Hostile takeovers, junk bond market, debt financing, and the leverage buyout (LBO) were the main characteristics of the fourth merger wave. The fifth merger wave focused on long-term strategy rather than short-term financial gains and the transactions were financed by equity rather than debt. As Gaughan (1998) described in Table 1 below, the first four waves occurred between 1897 and 1904, 1916 and 1929,

1965 and 1969, and 1984 and 1989. Merger activity declined at the end of the 1980s but resumed again in the early 1990's to begin the fifth merger wave (Gaughan, 2010, p29). Capron (1996), noted that each wave of M&A has its own economic efficiency and legitimacy that affect the U.S. economy. The five waves brought general macro-economic and micro-economic patterns to not only the U.S. economy, but also the world economy (Capron, 1996. P.1).

Table 1

Dominant Mergers and Acquisitions Waves

1 st Wave	1897–1904	Horizontal Mergers
2 nd Wave	1916–1929	Oligopolies and Consolidations
3 rd Wave	1965-1969	Conglomerates
4 th Wave	1984–1989	Mega-mergers and Hostile
5 th Wave	1992-Present	Takeovers Consolidations

First Merger Wave, 1897–1904

The first U.S. merger wave occurred between 1897 and 1904 (Gaughan, 2010). This merger wave was started during the economic expansion after the depression (Vazirani, 2015). During the first merger wave, over 300 industrial combinations were formed and involved about half of the country's manufacturing capacity (Moody, 1904). The emergence of the first merger wave is associated with the recovery of economic

growth that occurred in the period between 1892 and 1902, as well as with the development of economic infrastructure (Gaughan, 2010). The first merger wave is defined as a Horizontal Merger and played a pivotal role in creating large monopolistic market structures in the United States economy (Gaughan, 2010). In various industries, such as oil and steel, several domestic monopolies, most notably Standard Oil and U.S. Steel, contributed billions of dollars to improve the U.S. economy (Vazirani, 2015). Beckett (1986) noted that this first set of mergers contributed to changes in the laws and regulations regarding mergers. According to Capron (1999), to avoid head-to-head price competition between organizations, companies brought a new perspective to mergers and acquisitions by negotiating new alliances. Faulker, Teerikangas, and Joseph (2014), noted the lack of regulation during the first wave and one of the factors that facilitated the “merging for monopoly”. Firms did not face legal constraints in acquiring other companies. For instance, United States Steel accounted for 75% of the U.S. steel industry’s market share, American Tobacco held a 90% market share, while Standard Oil accounted for 80% of its market (Gaughan, 2002). The first set of mergers allowed for corporations to gain power, creating the need for regulations to be put in place to prevent a monopoly. The horizontal integration of leading producers in the same industry created a number of lasting dominant firms that still survive in the present, such as Du Pont, U.S. Rubber, U.S. Steel, General Electric, Coca Cola, and National Biscuit.

Second Merger Wave, 1916–1929

The second wave of M&A occurred between 1916 and 1929. Gaughan (2010) defined the second wave as merging for oligopoly and consolidation. While the second

wave was structures as an oligopolistic industry, several industries consolidated. “Between 1926 and 1930, a total of 4,600 mergers took place, and from 1919 to 1930, 12,000 manufacturing, mining, public utility, and banking firm dissolved” (Gaughan, 2002, p. 30). Compared to the first wave, the antitrust environment was markedly more challenging and controversial. Congress decided to take further action and passes the Clayton Act in 1914, “a law that reinforced the anti-monopoly provisions of the Sherman Act” (Gaughan, 2002, p.36). The Clayton Act preserved the competitive markets and deterred unethical mergers and acquisitions. At this wave period, many companies in unrelated industries merged and this period became the first indication of the formation of conglomerates.

In 1929, the stock market crash and the Great Depression resulted in the end of the second wave mergers (Lipton, 2006). As the Great Depression took hold in the U.S., the second wave mergers were completely devastated so corporate mergers and acquisitions declined significantly. The industries, corporations and companies were no longer interested in expanding their businesses, preferring to focus simply on surviving the depression (Faulker et al., 2014). The third merger wave emerged approximately 30 years after the decline of the second (Faulker et. al., 2014). There was substantiated evidence that post-depression, there were virtually no mergers and acquisitions. That led to dramatic development of major technological changes in the United States. In 1950, congress passed the Celler-Kefauver Act to enhanced safety and credibility of mergers and acquisitions (Faulker et al., 2014).

Third Merger Wave, 1965–1969

The third wave began in 1965 and ended in 1969, this wave was historically the highest level of merger activity (Gaughan, 2010; Tanimura & Wehrly, 2012). (Gaughan, 2010). “In contrast to the first two waves, which were restricted to the United States, the third merger and acquisition wave took place not only in the United States, but also in the United Kingdom and Continental Europe” (Faulker, et. al., 2014, p.22). Unlike the first (horizontal) and second (vertical) merger waves, the third merger wave was characterized by the formation of conglomerate merger. A conglomerate merger occurs when firms in unrelated industries merge (Aytac & Kaya, 2016). According to the Federal Trade Commission report of 1977, 80% of mergers in the third merger wave were of a conglomerate nature. During this period, healthy companies and corporations aimed to acquire smaller companies. Most of the M&A occurred when companies and corporations were neither competitors, nor had a buyer-seller relationship within their industries Gaughan (2002). According to Faulker et al. (2014), 80% of mergers and acquisitions occurred in the third wave period. The authors noted that the intent of the larger companies was to acquire as many smaller, non-competing companies as they could. The first goal of the conglomerate mergers was to enhance both the takeover company’s profit and reputation (Gaughan, 2002). During the conglomerate merger waves, firms continually sought to expand, while antitrust regulations from the Celler-Kefauver Act of 1950 were employed to strengthen those put in place by the Clayton Act of 1914 (Capron, 1999). With this reliance on the government, companies became more enthusiastic regarding selling and buying to enhance their profitability. In 1968, Litton

Industries announced a decrease in earnings, and as a result the market saw a decline of the third merger wave. This unusual phenomenon impacted the United States markets, directly influencing conglomerates to the degree that the percentage of conglomerates declined dramatically (Capron,1999). In 1968, the market eventually began to see through these financial manipulations and the Attorney General announced plans to crack down on conglomerates (Capron,1999). As a result, over the years, conglomerates mergers declined in popularity in terms of companies aims to enhance their profitability.

Fourth Merger Wave, 1984–1989

The fourth wave occurred from 1984 to 1989 (Gaughan, 2010). In this wave, changes in markets, technology, deregulation of airlines, trucking, telecommunications and banking, as well as financial innovation brought sudden and dramatic change to many industries. This merger wave is distinguished from the previous three waves by the size and prominence of the merger targets. By the end of the fourth wave, the average USD value of M&A activity increased by five times. The average USD value had risen from USD 22.8 billion in the third wave to USD 146.2 billion in this wave (Megastat Review, 2002). According to Gaughan (2002), the statistics indicate that the acceleration of mergers and acquisitions declined in 1982 for one year, then reversed direction again in 1983. In 1984, the first remarkable mergers and acquisitions occurred and brought new perspective to the economy in terms of future credibility of M&As. A rise in hostile takeover activities also made this fourth merger wave distinct from the other waves. Gaughan (2002), explains friendly and hostile takeovers as “corporations and speculative partnerships played the takeover game as a means of enjoying very high profits in a short

time” (p.72). In addition to hostile takeover, this wave period was noted for “junk bond” financing and the steadily increased volume and size of leverage buyouts (LBOs) (Capron, 1996). At this point, some of the United States largest corporations were determined to be potential profitable targets and many of the M&As were successfully transacted. This led to an economic expansion of hundreds of millions of U.S. dollars (Gaughan, 2002). The fourth merger wave ended in the late 1980s as the junk bond market collapsed, along with the introduction of Financial Institutions Reform, the Recovery and Enforcement Act (1989), and the loan portfolio and capital problems of the commercial banks.

Fifth Merger Wave, 1992–Present

The fifth wave occurred from 1992 to present. Beginning in 1992, the percentage of mergers and acquisitions increased exponentially (Gaughan, 2002). The leading industries in the fifth wave M&A activity were banking, telecommunications, oil and gas, radio and TV stations with increasing ties developing between telecommunications and radio and TV (Mergerstat Review, 1994). The increasing economic globalization, combined with the technological revolution in the early 1990s, triggered the reawakening of mergers and acquisitions. (Faulker et al., 2014). Important factors such as globalization of competition, deregulation of financial institutions and telecommunications, privatization of state-run enterprises on all continents, new technologies, favorable public policy environment, and financial market conditions contributed to the fifth wave. It was an indication of the “global wave involving intense acquisition activity in the United States, Europe, and Asia” (Faulker et al., 2014, p. 25). A merger increased an

organization's ability to compete in foreign markets by providing rapid access to an established distribution system, knowledge of local markets, economies of scale, and complementary products. This provided tremendous opportunities for domestic companies to have an advantage with their competitors in the international market.

Gaughan (2010) stated that the mistakes from the 1980s would not be repeated in the exponentially increasing the global economy. In this wave, M&As are based on long-term strategic and economic motives rather than focusing on quick financial gains.

Gaughan (2010), noted that companies focused on more strategic deals resulting in win-win outcomes for buyers and sellers. Faulker et al. (2014) explain the meaning of strategic deals as "in contrast to 1980s merger and acquisition wave, acquirers relied primarily on stock to complete transactions were entirely financed with stock" (p.25).

Faulker et al. (2014) argued that several companies had chosen to go with hostile acquisitions, which had a negative effect on the increasing fifth merger wave in the global economy.

Knowledge Assets

Knowledge assets result from knowledge-creating processes that occur during discussions and practices in workplaces. In today's, fast-paced global economy, corporations are undergoing mergers and acquisitions to move into new markets, gain knowledge/intellectual property, and create synergies. M&A is commonly used as a strategic tool to access new knowledge (Barney, 1991). The most common driver for M&A is often the objective for gaining new knowledge from the acquired company (Bresman, Birkinshaw, and Nobel, 1999). According to Grover and Davenport (2001),

knowledge is viewed as an asset in its own right and not only as an enhancement of other kinds of assets. Knowledge assets or intellectual assets are economic assets in their own right. Knowledge assets are defined as anything valued without physical dimensions that is embedded in people or derived from processes, systems and the culture associated with an organization (Bukowitz & Williams, 1999). Knowledge assets are stocks of knowledge that allow the organization and the provision of services for an unspecified period (Boisot, 1998). Nonaka et al. (2000) define knowledge assets as firm-specific resources that are indispensable to creating value for the firm. Nonaka places knowledge assets at the base of knowledge creation process, explaining that they are the processes' inputs, outputs and moderating factors (Nonaka et al., 2000). They are often invisible, tacit and dynamic and this makes the capturing of their value difficult, similarly to the economic perspective (Nonaka et al., 2000; Teece, 2000). Since knowledge assets cannot always be readily bought or sold, they shape a firm's competitive advantage (Teece, 1998; Nonaka et al., 2000).

There are four types of knowledge assets corresponding to the four stages of the knowledge creation (Nonaka et al., 2000): experiential knowledge assets, conceptual knowledge assets, systemic knowledge assets, and routine knowledge assets (See Table 2 below). Since this research aspires to understand the interrelationships of the knowledge creation process with its context and its content, an in-depth examination of these knowledge assets is useful due to the fact that they define the content of this process within the merged organizations.

Table 2

Four Categories of Knowledge Assets by Nonaka et al. (2000)

Experiential Knowledge Assets	Conceptual Knowledge Assets
<p>Tacit knowledge shared through common experiences</p> <ul style="list-style-type: none"> • Skills and know-how of individuals • Care, love, trust, and security • Energy, passion, and tension 	<p>Explicit knowledge articulated through images, symbols, and language</p> <ul style="list-style-type: none"> • Product concepts • Design • Brand equity
<p>Routine Knowledge Assets</p> <p>Tacit knowledge routinized and embedded in actions and practices</p> <ul style="list-style-type: none"> • Know-how in daily operations • Organizational routines • Organizational culture 	<p>Systemic Knowledge Assets</p> <p>Systemized and packaged explicit knowledge</p> <ul style="list-style-type: none"> • Documents, specifications, manuals • Database • Patents and licenses

Note. Reprinted with permission.

Experiential Knowledge Assets

Experiential knowledge assets consist of the shared tacit knowledge that is built through shared hands-on experience amongst the members of an organization, and between the organization and its customers, suppliers and affiliated firms (Nonaka et al., 2001). Their tacit nature not only makes efforts to capture, measure, evaluate or trade difficult, but also makes them firm specific, difficult to imitate resources that can lead to a competitive advantage. Organizations need to build their knowledge assets through

their own experiences. The experiential knowledge assets of skills and know-how that are acquired and accumulated by individuals through experiences at work are of particular importance to the present research, since the knowledge-routinized and a merged organization depends on them for the performance of the tasks at hand (Blackler, 1995). In addition, the experiential knowledge asset of know-how is linked to the skill acquisition process. Know-how is the ability of an individual or a team to perform a certain kind of activity or task smoothly and efficiently and requires the accumulation of practical skill or expertise (Machlup, 1982). It must also be learnt and acquired, while practice is required for its maintenance (Kogut & Zander, 1992).

Conceptual Knowledge Assets

Conceptual knowledge assets consist of explicit knowledge articulated of ideas through images, symbols, and language (Doyle, 1999). This knowledge creation process requires both stimulation and focus (Scarborough, 2016). They are based on the concepts held by members and customers of an organization (Nonaka et al., 2000). Brand equity and concepts or designs, as perceived by customers and organization members, are also conceptual knowledge assets (Nonaka et al., 2000). Since conceptual knowledge assets are created with the use of images, symbols, languages, not only the existence of a language known and accepted by all participants, but also conversation and its content, its style and its management are important (Krogh & Ross, 1996; Von Krogh et al., 2000). In contrast to experiential knowledge assets, they have tangible forms and are easier to grasp, and since they have no habitat, they can be easily articulated and engineered (Boisot, 1995).

Systemic Knowledge Assets

Systemic knowledge assets consist of systematized and packaged explicit knowledge, such as explicitly stated technologies, product specifications, manuals, reports, licenses, contracts, patents, and documented and packaged information about customers which makes them easily transferable (Nonaka, et al., 2000; Klint & Verhoef, 2002; Nakhla, 2003). Systemic knowledge assets can be quantified relatively easily and can be measured in contrast to other types of knowledge assets (Miles et al., 1998; Sveiby, 2000). Since this kind of knowledge asset is the most “visible”, often the focus is primarily on its storage, retrieval, access, and management.

Routine Knowledge Assets

Routine knowledge assets consist of the tacit knowledge that is routinized and embedded in the patterns of thinking, the practices and the actions of organizational members through continuous exercises (Nonaka et al., 2001). The formation of routine knowledge is also facilitated when members share a common background and history. Know-how, organizational culture and organizational routines for carrying out the day-to-day business of the organization are examples of routine knowledge assets. Routines in organizations are the equivalent to individual skills and they are formed by a tacit and collective type of knowledge (Nelson & Winter, 1982; Matusik & Hill, 1998). Organizational routines constitute a fundamental part of the organizational memory, since they are accumulated stocks of know-how in the procedural knowledge (Nelson & Winter, 1982; Cohen & Bacdayan, 1994). Socialization, education, imitation, problem-solving, and personnel movement are basic ways for the transmission and movement of

organizational routines (Levitt & March, 1988). Besides organizational routines, Nonaka's framework views organizational culture as an additional routine knowledge asset.

Table 3

summarizes how this research study links knowledge creation process with its context and its content. Reprinted with permission.

	Phase A	Phase B	Phase C	Phase D
The SECI Process	Socialization	Externalization	Combination	Internalization
	Skill acquisition process	Fault identification process	Planning and scheduling process	Execution process
Knowledge Assets	Experiential Knowledge Assets	Conceptual Knowledge Assets	Systemic Knowledge Assets	Routine Knowledge Assets
	Skills and know-how of individuals	Product concepts	Documents, specifications	Know-how in daily operations
	Care, love, trust, and security	Design	manuals	Organizational routines
	Energy, passion and tension	Brand equity	Database	Organizational culture
			Patents and licenses	

Organizational Culture

Schein (1992) argued that culture represents the expression of new beliefs, assumptions, and values by members of the organization or groups. Organizational culture was a major determinant of the success or failure of mergers and acquisitions. Weber and Tarba (2012), found organizational cultures could have a direct impact on the manager and employee behaviors that can lead to the success of a merger. The concept of culture suggests shared history, unwritten rules, social customs and expectations that shape the behaviors of individuals within an organization (Ling, 2011). Organizational culture is defined as the set of underlying beliefs, which are rarely articulated directly, but which influence employees' perceptions of communications and actions (Safa, Shakir, & Boom, 2006). Muscalu (2014), defined organizational culture as having three key elements: beliefs, behaviors, and attitudes of the people. During a merger, leaders often do not value or consider organizational culture (Van Dyke, 2015). The culture of an organization helps to create the norms and values that prevail in the working environment during a merger. Establishing a new culture takes some time, however, managers need to remain open and communicate with employees throughout the change implementation. All of these factors are important for knowledge management success (Al Saifi, 2015; Ling, 2011; Huang & Hsiao, 2010). Knowledge management is not a one-off practice but needs to be embedded within these values and norms (Jones & Sallis, 2002).

Organization culture controls various patterns, as well as the behavior of employees within the organization. It can be used in knowledge management implementation, particularly in relation to knowledge sharing (Razmerita et al., 2016). At

the same time, there are challenges associated with the role of organizational culture in knowledge management during a merger. The development of a knowledge management system to achieve specific objectives requires various activities to change to become knowledge-based, which has implications for organizational culture (Chong, 2006). Employees also need to become knowledge-based workers, which involves the creation of a knowledge management culture that supports sharing knowledge, as well as the creation of value during a merger. Clearly, communication is not only essential for knowledge management, but also for the entire organization during a merger. Open communication of merger activities can help reduce or eliminate the unknown and have the employees feel they are part of the merger process. Effective communication reflects effective information sharing, which develops overtime, and efficient decision making (Chen et al., 2016). In relation to knowledge management during a merger, communication means collaboration, interaction, and information sharing, leading to successful decision making that drives development and growth. Employers who maintain open communication channels with employees during a merger will increase trust, commitment, and innovation among the employee (Kim, 2011). Open communication and information exchange are critical during a merger (Bansal, 2015). With effective communication channels in place, knowledge sharing can become easy within the organization. Knowledge is for anyone who can utilize it to achieve desired outcomes. All these elements are derived from the organizational culture. A corporate culture that lacks communication channels cannot motivate the workforce to trust each other and share learning activities. The absence of communication channels also makes it

difficult for management itself (Murray & Peyrefitte, 2007). The core of successful knowledge management lies in interaction and socialization so that information and knowledge can be shared through efficient communication channels (Andreeva & Ikhilchik, 2011).

Organizational culture is an indispensable element in the success of Nonaka's model (1995). Culture integrates multiple aspects of an organization. Nonaka and Takeuchi's model propose that the culture prevailing in an organization should be based on collaboration, learning and trust (Ling, 2011; Sankowska, 2013). Organizational culture involves shared values, assumptions and beliefs that guide employees' behavior in the workplace. According to Nica (2013), every organization maintains and develops a unique culture that includes boundaries and guidelines for the behavior of its employees. Organizational culture has been identified as a fundamental determinant of the success or failure of knowledge management, and extensive research has identified those aspects of culture that promote knowledge creation and sharing (Al-adaileh & Al-atawi, 2011). The general consensus is that knowledge sharing flourishes in less formalized, more decentralized and entrepreneurial environments (Chen & Huang, 2007).

Each organization has its unique values that collectively represent its culture. Ibrahim and Heng (2015), argued that effective socialization is highly dependent on organizational culture and the interaction among individuals and collective individuals such as corporations. Nonaka and Takeuchi (1995), identified socialization as the first knowledge management transfer method (exchange of tacit knowledge). Socialization is the process of collecting tacit knowledge through shared values and experiences (Nonaka

& Takeuchi, 1995). In addition, culture influences tacit knowledge sharing behavior. The reason to focus on tacit knowledge retention is that it is becoming the only source for competitive advantage for companies (Harlow, 2008). The following section examines the four elements that represent organizational culture: trust, collaboration, learning and motivation.

Trust

Trust should exist among top management, lower management and employees because trust is an important determinant of productivity and the keys to effective and efficient knowledge sharing (Ling, 2011; Sankowska, 2013). Establishing an environment of trust where employees feel safe in sharing their knowledge is crucial. Trust in the organization is important because it allows managers and employees to confidently discuss organizational issues (Berraies, Chaher, & Yahia, 2014; Finley & Sathe, 2013). According to Nica (2013), trust allows employees to voice their problems and input their opinions to improve the organization. According to Buonon and Bowditch (1989), trust is essential to the integration process during a merger. When managers take into consideration the integration factors of employees' uncertainty, dealing with conflict, and feelings of insecurity, during mergers, it helps to maintain trust for the employees (Thakur & Bansal, 2015). The transition time for the integration of processes can also create an atmosphere of tension and mistrust. The integration processes can be viewed as unfair by some employees (Hopkins & Weathington, 2006) since changes may occur in both corporate programs. Employees are unaware of the intentions of the newly combined organization; they might not trust the motives of the managers within the new

organization. Open communication of the intended changes will help to develop employee trust (Bansal, 2016).

Collaboration

In recent decades, the complex and dynamic business environment has encouraged the development of knowledge creation process through collaboration (Razi & Karim, 2010). Trust is a prerequisite for creating a collaborative environment, which can generate useful knowledge (Sankowska, 2013). Building a collaboration needs strong leadership, and is based on communication, trust, and shared purpose and vision (Berraies, Chaher, & Yahia, 2014). Collaboration is not a vague aspiration, but it may estimate the value which can be developed through training of employees and executives, practice and reflection across the organization. Effective collaboration is about increasing the talent, time and tools to create organizational value (Finley & Sathe, 2013).

Learning

A learning organization is one that is always in the learning phase (Sarayreh, Mardawi, & Dmour, 2012). In a merger, learning enhances understanding and increases knowledge sharing. According to Bratianu (2014), the Nonaka model proposes that an organization should create knowledge continuously. This is possible by restructuring existing knowledge through the use of knowledge transformation processes. Knowledge creation has an impact on the learning process, and it is believed that both organizational learning and knowledge creation can help to create a new way of ensuring continuous improvement and enhancement of organizational performance. Knowledge management has attracted considerable attention in the past few years. Organizations are implementing

different models and theories to create, share and integrate knowledge to facilitate the learning processes (Oye & Salleh, 2013). To compete effectively in the global world, it is necessary to integrate learning processes, which can assist employees to learn new skills to perform their work. Razi and Karim (2010) concluded that a learning culture enhances knowledge creation process in relation to all four elements (i.e. socialization, externalization, combination and internalization).

Incentives and Rewards

It is essential for organizations to provide an incentive and reward structure. A diligent workforce deserves to be rewarded in order to keep everyone motivated (Ramjeawon & Rowley, 2017). The incentive and reward structure help to keep employees motivated and encourages them to participate and perform efficiently. It is necessary to use performance management metrics and disseminate information about the reward policies and strategies. In the process of knowledge management in a merger, employees are required to participate and share knowledge with each other (Zhang, Zhao, & Wang, 2016). Through socialization, employees communicate and facilitate processes of learning and development. Jaleel and Verghis (2015) proposed that linking reward and incentive schemes to the process of knowledge management positively impacts on employees' motivation to learn and develop skills to share knowledge with others. Rewards which may be tangible or intangible, play a major role in motivating employees to implement knowledge creation and sharing approaches and processes (Berraies, Chaheer, & Yahia, 2014). In any organization, incentive mechanism is valuable and has a long-term effect on the behavior and activities of employees (Bratianu, 2014).

Information Technology

Information technology is always one of the major challenges for companies that are merging (Chin, Brown, & Hu, 2004). Information technology had changed drastically creating a critical issue for managers of merged organizations. Merging two organizations can create an overabundance of technology programs. The managers will have the task of deciding which programs best fit the new organization. The efficiency of the knowledge management process depends on the availability of appropriate information technology infrastructure (Mills & Smith, 2011). Sandhu, Jain and Ahmad (2011) argued that for information technology to become a success factor for knowledge management, organizations should develop an approach and content that reflect the needs of their users. It is important to establish common portals for knowledge sharing, that databases contain sufficient details, and that the systems support future growth. Appropriate training is also important to ensure that individuals know how to use the information and communication technology correctly.

Information technology involves more than merely processing data and information. It aids in communication between individuals through chat rooms, video conferencing and email. It also plays an increasingly important role in knowledge management (Willem & Buelens, 2009). Information technology plays an important role in Nonaka and Takeuchi's knowledge creation and sharing process. It is responsible for managing and sharing databases and all other forms of explicit knowledge (Alazmi & Zairi, 2003). Databases, information centers and dissemination of the databases need to be effectively and efficiently supported to enhance knowledge management and

knowledge sharing within the business (Kumar, Jain & Tiwary, 2013). This includes ensuring that all aspects of the business are integrated and that responsible personnel are linked with the knowledge they need. This is important for knowledge creation as well as knowledge sharing (Razi & Karim, 2010). The use of information technology in supporting knowledge management is demonstrated in the extent to which information technology supports collaborative work, communication, searching, accessing, simulation, prediction, and systematic storing of information and data (Lee & Choi, 2003). Many researchers highlighted the importance of information technology infrastructure in supporting knowledge creation process (Berraies, Chaher & Yahia, 2014; Jeng & Dunk, 2013). Information technology makes available a range of tools such as internet, intranet, groupware, workflow, datamining, and video conference to help organizations manage knowledge. It allows employees to connect with reusable codified knowledge and provides a conduit between newly created knowledge (Berraies, Chaher & Yahia, 2014; Kuo & Lee, 2011). With information technology, mergers can absorb vast amounts of information and share, apply and create knowledge (Gold, Malhotra, & Segars, 2001).

Knowledge Management

Knowledge management can be evaluated using different models and measurement techniques. The knowledge management process involves acquiring, converting, applying and protecting knowledge within a structural, cultural, and technological infrastructure. These vital organizational capabilities have the potential to significantly and positively impact on the performance and effectiveness of

organizations. Performance measurement is defined as the collection of data and information about the effectiveness and productivity of individuals, groups and organizations, suggesting its association with key areas such as expansion, innovation and productivity (Carneiro, 2001). Measurement provides indicators and benchmarks from which organizational goals, performance and improvements can be calculated (Conley & Zheng, 2009).

A positive relationship between performance measurement and successful implementation of knowledge management was shown (Moffett, McAdam, & Parkinson, 2003). According to Suppiah and Singh (2011), most organizations avoid measurement as they consider this to be an investigation of their income and returns on investment. Measures indicating the presence of knowledge flow, sharing or transformation indicate the efficiency of the current operations or strategies (Ragab & Arisha, 2013) observed that the development of a link between knowledge management strategies and core business outcomes increases the flow of knowledge. Knowledge management performance measurement programs enhance the detection, mapping, examination and dissemination of intangible assets, knowledge flow patterns, social networks, essential knowledge issues and best practices in an institution. They are crucial for control, assessment and enhancement of knowledge practices and to ensure that the knowledge management remains on track (Ramachandran, Chong, & Wong, 2013). According to Nonaka and Takeuchi's framework, any practical analysis or assessment of spiral knowledge formation is an unattainable task (Bratianu, 2014). A knowledge management

value chain consists of four main activities: creation of knowledge, storage of knowledge, distribution of knowledge, and application of knowledge (Lee & Buckthorpe, 2008).

Employee Involvement

Employees' involvement in organizational activities, where they are responsible for achieving a set of goals and objectives, is believed to motivate their efforts and lead to further contributions (Wang, Noe, & Wang, 2014). Forcada et. al. (2013) commented that encouragement and appreciation of employee involvement makes a social contribution within the organization. In the context of a merger, it is widely perceived that employee participation strengthens decision making within organizations and that the efficiency of the interactions diminishes the need for close supervision. The execution of knowledge management involves the participation of managers as well as employees (Chumjit, 2013). The exchange of knowledge has to be distributed within the organization from bottom to top. Every employee needs to be included and encouraged to actively participate in knowledge management. Creation and sharing of knowledge cannot be achieved without employees' involvement. The knowledge that is created and shared enhances the knowledge base of the workforce to the benefit of the organization and employees' own performance (Chong & Choy, 2006; Lee & Choi, 2003). It is also necessary for the organization to provide the necessary training and development to its workforce. When employees work in a team, they tend to be highly effective since teamwork balances out strengths and weaknesses (Holsapple, 2013).

Employees are also pivotal to the success of Nonaka's knowledge creation and sharing process. Employees are at the center of organizational knowledge creation

(Gottschalk, 2002; Scott, 1998). Knowledge management is 10% technology and 90% employees (Scott, 1998). Updated knowledge can be acquired by employing new people with specific skills (Chumjit, 2013; Nonaka & Takeuchi, 1995). T-shaped skills embodied in employees are amongst the core capabilities in the knowledge management field (Berraies, Chaher, & Yahia, 2014). T-shaped skills refer to specialist capabilities that allow employees to have significant and synergistic conversations with one another (Swap, Leonard, Shield, & Abrams, L, 2001). T-shaped skills represent the depth of skills and expertise in a field. An organization with T-shaped skills has a skilled workforce that is dedicated to the organization and has a wealth of knowledge. When an organization hires knowledgeable employees, the knowledge base of the entire organization increases and facilitates knowledge creation and sharing. Tacit and explicit knowledge can help the business grow and develop an effective and efficient knowledge base (Berraies, Chaher, & Yahia, 2014).

Teamwork

Teamwork is effective in initiating knowledge management as the organization brings employees with distinctive skills and knowledge together, enhancing the distribution of knowledge (Jimenez, Martinez-Costa & Sanz-Valle, 2014). The formation of teams within an organization involves a process of skills diversification that can lead to the efficient handling of organizational processes and critical problem solving (Chuang, Jackson & Jiang, 2013). According to Calvo-Mora, Navarro-García, Rey-Moreno, & Periañez-Cristobal, (2016), corporates in the current era are highly engaged in future learning and development of their employees. On the other hand, bureaucratic

organization restricts the sharing of knowledge. The best way to ensure that employees are involved in knowledge management is through teamwork. This can be achieved through the development of team-building activities that require employees to function as a group (Chong & Choi, 2005). It also leads to the sharing of knowledge. Teamwork can be employed during training and innovation programs. It is vital to create a friendly culture in which knowledge management can be integrated, since the ability of workers to function as a team is crucial. In a merger, teamwork can also be used to improve the learning process (Kandel, Schwartz, Jessell, Siegelbaum, & Hudspeth., 2000).

Employee Empowerment

According to many researchers, knowledge sharing is neither efficient nor effective without the empowerment of employees (Amah & Ahiauzu, 2013). Employee empowerment strengthens the application of skills and knowledge since the individual feels focused, motivated and responsible for resolving complex situations (Kianto et. al., 2014). Knowledge management plays an important role in mergers, as sharing enhances strategic innovations, aligns performances, and results in higher effectiveness (Gong, Zhou & Chang, 2013). A sense of entitlement or belonging encourages commitment and participation. It also creates a conductively work environment and ultimately leads to increased productivity. When the leaders of an organization introduce knowledge management, employees' attitude toward the practices will determine their participation and the success of its implementation (Ramachandran, Chong & Wong, 2013). Having employee participate in decision making in matters that affect the entire organization enables empowerment. Employees can also be given new tasks and provided with

information to enable them to make the right choices. Empowered employees have the authority to do their job as they see fit. Empowerment must be preceded by appropriate training and development (Andreeva & Ikhilchik, 2011). Knowledge management practices require the workforce to make independent yet correct decisions. A team environment is beneficial (Hislop, 2013).

Summary and Conclusions

Mergers and acquisitions are widely seen as a way of surviving in the global marketplace. This chapter is concerned with merger history in the United States, including details of underlying factors which have influenced the merger waves and the economic performance of the merger activities in each wave. This chapter demonstrates that merger waves in the US are positively correlated to the country's economic prosperity. The main discussion is an understanding of the underlying factors which influence the occurrence of historic waves, their characteristics, and the main reasons for the end of each wave. Interestingly, each of the merger movements reflected some underlying economic or technological factors. Every merger wave arose mainly from external exogenous disturbances such as economic, technological and legal factors (Caves, Forunato, and Ghemawt, 1984). This is because M&As represent the process of resource allocation or reallocation in the economy and, as such, they will affect most people within the economy (Weston, Mitchell, & Mulherin, 2014). This section of the literature review aims to shed some light on the underlying factors that are favorable for the mergers, the characteristics of mergers, and the reasons why the waves ended.

This literature review was not merely to present the framework that is used in the pursuit of the research study, but also to show how it will explain the interrelations of knowledge creation processes with their context and their content and the influence of mid-level manager's actions and interactions upon them. The chapter started with a presentation of the definition of knowledge, a discussion on alternative perspectives on knowledge. Then, it was argued that Nonaka and Takeuchi's framework can address the phenomenon of interest better than other structural frameworks. This framework has become very influential worldwide and is widely acknowledged within the knowledge management community (Andreeva & Ikhilchik, 2011).

Previous research has explored the advantages and disadvantages of Nonaka's model in the business sector (Nonaka et. al., 2014). Based on this literature review, it is evident that there is a gap in both the literature and studies related to the phenomenon of new knowledge creation when tacit knowledge is integrated with intuitive decision processes. According to Reid, Bennett, Chen, Eldadah, Farrar, Ferrell, Zacharoff. (2011), identifying the research gaps help the research and strengthens the research methods and approaches. Nonaka (1994) explained that unlike the internalization process, the externalization concept is not well developed, and he recommended further research. In conclusion, this chapter not only establishes the importance of the Nonaka and Takeuchi's knowledge creation model as a lens through which the research makes sense of knowledge creation processes, but also point out that empirical research has been conducted in relation to its elements.

Chapter 3: Research Method

The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-size information technology firms in California from 2014 to 2019. The research question in a qualitative study is used to determine whom the participants will be, their number, and the topic of study (Cleary, Horsfall, & Hayter, 2014). I collected data from 12 mid-level managers who have worked in California and have been involved in a merger and acquisition.

This chapter begins with the method used to collect, record, and analyze the data. This chapter also includes a discussion of the research design. I present a broad description of the research methodology that was used in gathering the data. Also covered in this chapter are details of the participant selection logic, instrumentation, recruitment procedure, participation criteria, data collection plan, and data analysis. Lastly, I describe elements of trustworthiness to explain credibility, transferability, dependability, confirmability, and ethical considerations.

Research Design and Rationale

The research design for the study was phenomenological. To obtain a deeper understanding of the source, dimensionality, and manifestation of the phenomenon, a descriptive phenomenological design was employed (see Giorgi, 2012). This descriptive phenomenological research design followed the process prescribed by Giorgi, which was based on the work of Husserl (Giorgi, 2009, 2012). Giorgi was viewed as a leader in the development and use of the phenomenological method for empirical psychological

studies (Churchill & Wertz, 2011). Giorgi's framework emphasizes the researcher's need for psychological sensitivity/suspension of judgement, or epoché (Giorgi, 2012). The framework preserves the scientific method of inquiry by creating a rigorous structure for studying human experiential and behavioral phenomena (Giorgi, 2012). The purpose of the current qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-size information technology firms in California from 2014 to 2019. The following research question was used to guide the study: What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium-size information technology firms in California from 2014 to 2019?

The most characteristic element of the descriptive phenomenological research design is to carefully and in an objective manner develop descriptions of the pattern of a phenomenon's underlying characteristics (Mills, Durepos, & Wiebe, 2010; Giorgi, 2012). The researcher's goal in a descriptive phenomenological study is to remain as true as possible to the descriptions provided by participants depicting the phenomenon as they lived or experienced it (Giorgi, 2009; Jeanfreau & Jack, 2010). One of the main reasons why I chose the phenomenological research design was that it is a means to establish and understand the essence of human life experiences (see Lasch, Marquis, Vigneux, Abetz, Arnould, Bayliss, & Rosa, 2010). The design also enabled an in-depth description of the beliefs and thoughts of mid-level managers. In this study, data were collected through semistructured interviews with 12 mid-level managers above the age of 18, and data

saturation was reached with these 12 participants. Small studies reach saturation before larger ones, and saturation is required for the study to have quality and validity (Fusch & Ness, 2015). In most cases, the design requires the interviewer to understand the setting of the respondents and give appropriate prompting questions that allow participants to provide answers relevant to the study topic (Wladis, Conway, & Hachey, 2016). The design provides a basis to understand the respondents' perceptions and ensure that the right people narrate their experiences on the research issue. I ensured that the respondents had lived experiences on the topic of the study. Regarding the phenomenological design, it is important that every participant's comments are taken with high consideration.

Other methodologies were considered but deemed lacking. The narrative design was considered but rejected. This design includes only one or two participants (Marshall & Rossman, 2016) and was therefore inappropriate for this study's research question. The case study design requires in-depth and detailed research and examination of the case (Yin, 2009). A case study needs to focus on examining a specific phenomenon in its real-life context. The case study design was not employed in the current study. The grounded theory design was also considered. This approach includes participant interviews to generate a theory through inductive data analysis techniques (Khan, 2014). This approach was not applicable to my study because the goal was not to develop a theory, but rather to gain an understanding of mid-level managers' knowledge management assets in the retention of employees during a merger. In ethnographic research, researchers collect data through interviews and often live within the group during data collection (Kriyantono, 2012). This approach was not applicable to my study because it was not

necessary to observe and interact with mid-level managers in their operating environments.

Role of the Researcher

In this qualitative descriptive phenomenological research, I played a key role as the data collection instrument. I also selected the appropriate methodology and design, recruited participants, interviewed participants, and analyzed the data. I am an experienced project manager and used my experience to develop and facilitate the interviews to gain an understanding of the lived experiences of mid-level managers utilizing knowledge management assets in the retention of employees during a merger.

Data collection, analysis, and measurement processes were employed consistent with those prescribed by Giorgi (2012). The phenomenological research method's critical processes of bracketing, epoché, phenomenological reduction, and synthesis were employed throughout the study's collection and analysis phase (see Giorgi, 2012; Norlyk & Harder, 2010). These processes allow the researcher to remain objective when capturing the persistent themes and essential meanings derived from the interview data rather than from the researcher's subjective preconceptions or biases (Giorgi, 2012; Norlyk & Harder, 2010). The epoché is an affirmative and volitional psychological shift by the researcher from the natural to the phenomenological attitude; with this attitude, a critical consciousness is achieved to examine the phenomenon under investigation (Englander, 2012; Giorgi, 2012). The concept of bracketing reflects a state of mind divorced from the present and void of all prior knowledge, preconceptions, and biases about the studied phenomenon to allow the researcher to experience it in a new way

(Giorgi, 2012). The concept of phenomenological reduction is achieved by applying a psychological attitude toward the collected data, searching for changes or shifts in the experiential descriptions expressing their essential meanings (Englander, 2012; Giorgi, 2012). I strived to be objective when conducting this research. I ensured that the questions chosen would allow the participants to drive the content of the interviews.

The role of the researcher is to ensure the protection of the participants and the data collected. I presented the consent form to each participant before the study, and I emphasized that I would follow the ethical expectations of Walden University's Institutional Review Board (IRB) and the National Commission of the Protection of Human Subjects. All participants were informed that they would have the option to withdraw at any time throughout the study with no negative consequences. During the interview, I created an environment that encouraged the participants to be comfortable and confident. To ensure the participants were protected, I conducted interviews in a neutral and agreed meeting place and time. I recorded the responses and conducted transcript verification to ensure reliability, credibility, and validity of the data.

Methodology

This methodology section includes the research approach for this qualitative study. The research method used for this study was qualitative. A qualitative research method was selected to gain insight into the lived experiences of mid-level managers utilizing knowledge management assets in the retention of employees at recently merged medium-size information technology firms in California. This methodology was aligned with the research question, nature of the study, and literature review (see Nutbrown &

Clough, 2014). This section includes the participant selection logic, instrumentation, and procedures for recruitment, participation, data collection, and data analysis.

Participant Selection Logic

The target population for this study was 15 mid-level managers who worked for a California company during a merger and were above the age of 18. There is no ideal or minimum sample size in qualitative research. According to Marshall (1996), an appropriate sample size for a qualitative study is one that adequately answers the research question. In other words, the adequacy of the data for understanding a phenomenon is more significant than the number of participants (Marshall & Rossman, 2014). One approach to sampling in qualitative research is to continue collecting data until no new categories, themes, or explanations emerge from the data; this is known as achieving saturation (Marshall, 1996). Data saturation is reached when there is enough information to replicate the study, when the inability to obtain additional new information has been reached, and when further coding is no longer feasible (Fusch & Ness, 2015).

In this study, the sampling frame that enabled data saturation was 12 participants. Participants were purposefully sampled based on being a mid-level manager involved with employees in California and being involved in a merger process. To qualify for this study, the participants were required to have directly managed employees while a merger was taking place at a corporation. I sent an invitation through LinkedIn to connect with 15 or more mid-level managers in California to see who was interested in participating in this qualitative study. LinkedIn is the most visited professional online social network that allows individuals and groups to establish connections with other users (Briscariu, 2019).

Unlike other social networks, LinkedIn is dedicated to attracting professionals and individuals in business (Boyd & Ellison, 2010). I first sent an invitation to three LinkedIn professional groups to recruit participants for the study. After participants accepted my connect invitation, I sent them a LinkedIn email asking if they would like to participate in the study. Once I established a participant's eligibility, I requested their phone number to schedule interviews. I ensured that participants were above the age of 18 by looking at their work experience. Participants were chosen in accordance with the study's framework to research the lived experiences of mid-level managers and their use of knowledge assets during a corporate merger. Participants were recruited from diverse backgrounds, cultures, and ethnicities so that the study findings would be fair and unbiased. Participants were age appropriate for informed consent and had education and intelligence to participate in the study.

Purposeful sampling is commonly used in qualitative research for the identification and selection of information-rich cases related to the phenomenon of interest (Palinkas et al., 2015). Purposeful sampling is a common type of nonprobability sampling strategy in qualitative research (Albaqami, 2015). The aim is to select participants who have the most useful information that can be collected via interviews (Patton, 2015). A good research design has its components working in harmony so the study can be functional and successful (Maxwell, 2013). To have a successful study, I made sure the participants understood the research question and the purpose of the study. I used purposeful sampling to recruit participants through LinkedIn social network professionals.

Instrumentation

I was the primary data collection instrument in this qualitative study (see Rimando et al., 2015). In this study, the data sources were interviews, a reflective journal, and an observation sheet to increase the dependability of the results. The semistructured interview process allows for follow-up questions in the interview to provide an in-depth understanding of the responses (Yin, 2014). The interviews were conducted through telephone and ranged between 30 and 60 minutes in length. The reflective journal provides the researcher with cues in body language, voice, and “extra information that can be added to the verbal answer of the interviewee on a question” (Opdenakker, 2006, p. 3). Through reflective journaling process, I focused on the data being collected from the account of the participants without entangling my own thoughts and feelings. The observation sheet contained the interview questions and space for short answers. Content validity was established through transcript verification. I used a digital audiotape so that the data can be downloaded and played on the computer. I used NVivo software to analyze the data from the study after transcribing the interview results.

Field Test

I conducted a field test on the interview questions to refine my procedures and revise my interview questions. The field test aids in ensuring the reliability and validity of the test instrument (Van Teijlingen & Hudley, 2002). The field test participants included three experts in the qualitative field who analyzed the questions to ensure that they were properly aligned with the research question. The experts that participated in the field text were academia professionals with extensive knowledge with qualitative studies.

Since their main purpose was to assess the appropriateness of the projected interview questions, their responses will not be included in the data analysis (Patton, 2015). I recruited the experts by emailing five prospective participants a solicitation letter (See Appendix B). The professors were able to provide new dimensions and conceptions for consideration (Maxwell, 2013). As a result of the field test, three experts recommended adjustments to the interview questions to ensure that they would result in data that would answer the research question.

Procedures for Recruitment, Participation, and Data Collection

I conducted all interviews and performed all data collection and data analysis. To conduct recruiting for this study, I posted a request for participants on three group message boards on LinkedIn, a professional networking website. Each participant meeting the criteria received the informed consent form through email to acknowledge “I consent,” which they then return by replying to the original email. After the informed consent form was returned agreeing to participate in the study, a follow-up email was sent to the participants to schedule a day and time for the phone interview. Within the informed consent form, the participants were made aware that participation was strictly on a volunteer basis and their decisions to participate could be withdrawn at any time without repercussions. The interviews were conducted using phone and all participants received the interview questions within 24 hours of confirming the interview date and time to provide a clear understanding of what would be asked of them.

Data Collection

Data collection occurred in my home office using the telephone and computer. My role as the researcher was to collect data. The primary source of data collection for this study consisted of transcripts generated from semi-structured interviews with qualified participants. Interviewing is the process to obtain information through verbal communication (Edwards & Holland, 2013). Interviews are considered a primary data collection procedure for qualitative research (Norlyk & Harder, 2010). In this study, I used semi-structured interviews to collect data on the lived experiences, perceptions, and beliefs of the participants utilizing knowledge management assets in the retention of employees during a merger, and to answer the research question. Additionally, it is important to note that both the data collection and the data analysis procedures of this study followed Hycner's (1985) phenomenological data analysis. For a qualitative interview, the researcher becomes the instrument by recognizing any conceptions that prevent understanding the phenomenon under study (Patton, 2015). The reason for using a semistructured interview is because of flexibility in the type of questions that specifically cover the topic, and how participants choose to respond (Rubin & Rubin, 2012). The interviews were on average between 30 to 60 minutes audio-recorded phone calls. Participants were asked questions pertaining to the study topic. The interviews were audio recorded to help in further investigations and data analysis. The participants were debriefed and given a chance to re-consent to the utilization of the data. I used the Hycner (1985) phenomenological data analysis process to analyze the participants' interview answers.

In qualitative study, transcription is a process of translating audio-recorded interviews from spoken text to written form analysis (Sutton & Austin, 2015).

Transcribing recorded interviews is essential for the researcher in making decisions that impacts what is comprehended from the data. I transcribed the interviews for accuracy of the generated meanings and perceptions shared by participants during the interviews (Sutton & Austin, 2015). Before completing the data collection process, transcript verification occurred by sending each participant a copy of their interview which I transcribed for their review. Once the participant received the transcribed data and approved those data for accuracy, I reiterated with them that participating in this research study was voluntary and all information collected would remain confidential. Each participant was informed that they had a week to get the transcription returned to me and any transcripts not returned would be considered as approved.

Data Analysis Plan

In this research, the data analysis plan is based on Hycner's (1985) phenomenological analysis process. The use of this process was more feasible to my study and permitted me to transcribe the raw data into useful data. The data analysis experience helped me to explore the interview data to ensure it captured the lived experiences of the participants. The five stages of the phenomenological data analysis by Hycner (1985) include: (a) Bracketing and phenomenological reduction, (b) Delineating units of meaning, (c) Clustering of units of meaning to form themes, (d) Summarizing each individual interview, (e) Generating composite descriptions.

The first stage in the data analysis involves the process of bracketing and phenomenological reduction (Hycner, 1985). Bracketing involves the process of the researcher working to set aside their personal biases and preconceived ideas about the topic in preparation for the analysis of the data. Phenomenological data reduction is the process of reducing large chunks of data within a given text into smaller units of meaning such as codes. These codes represent the smallest units of experience of the participant. After completing each transcript and with an open mind, I looked closely at the information without any pre-supposition or judgment to allow meaning to emerge and to hear what the participant was saying. It was very important to understand their part of the story and their world. I was conscious of my personal bias as I went through the data with an open mind to understand what participants were saying.

The second stage of the data analysis is the delineation of units of meaning from the data (Hycner, 1985). This process involves examining the units of meaning with respect to the research question. If a participant's response contributes to an understanding of the research question, the comment is noted as a unit of relevant meaning (Hycner, 1985). I compiled a preliminary list of units of meaning, which are statements that are relevant to their experience. I went over every word, phrase, sentence, and paragraph noting significant communication and made notes to provide coherent meaning. In the process of delineating units of general meaning, I included all general meanings including redundant ones.

The third stage of data analysis involves the clustering of units of meaning to form themes (Hycner, 1985). Based on the developed codes, I organized the data into clusters of themes based on their similarities with each other.

The fourth stage of data analysis involves summarizing the experience of each participant (Hycner, 1985). I developed a summarized narrative of the lived experience of each participant based on the analysis of the interview transcripts. The summarized narrative contained direct quotes from participants to strengthen the findings.

The fifth stage of the data analysis is the generation of composite descriptions, containing the general and unique themes developed from the data (Hycner, 1985). The composite description is an abstracted narrative of the experience of the entire sample as a group. The composite description does not rely on the experiences of a single participant, but on experiences that occur in several participants in the sample group.

In addition, I used NVivo, a Computer Assisted Qualitative Data Software (CAQDAS) that aided in data organization, categorizing, sorting, and storing of data (Jackson, & Bazeley, 2019). The NVivo software program was developed to help researchers to organize and analyze data collected through interviews. The program allowed data to be coded and reorganized into themes noted from the collection of data. I used NVivo for data analysis to create nodes for each interview question and sub nodes to categorize the positive and negative responses from each participant. The words and phrases from these sub-nodes helped in discovering matching patterns of how mid-level managers utilizing knowledge management assets in the retention of employees at recently merged corporation. Pattern matching was done through the word query feature

of the software, and source and reference data was provided to estimate saturation. Data analysis used transcript verification to make sure my interpretations of what they said were reflective of the participant's experiences.

Issues of Trustworthiness

Rigor or quality of data ensures the trustworthiness of its findings (Miles, Huberman, & Saldana, 2014). In a qualitative study, the intent of trustworthiness supports the value and soundness of the research study's findings by the accuracy of detailed data (Miles, et al., 2014). Researchers need to make sure their studies are credible, transferable, dependable and confirmable. According to Patton (2002), rigorous methods, credibility of the researcher, and philosophical belief in the value of qualitative inquiry are vital in assessing the quality of qualitative research. Anney (2014) identified four criteria to judge trustworthiness in qualitative research—credibility, transferability, dependability and confirmability. To ensure my study was in adherence to the four conditions, the application of each of these criteria in my study is discussed in detail below.

Credibility

Credibility or internal validity is assessed by examining whether the findings obtained by the researcher match the personal constructions of the participants (Albaqami, 2015). Credibility reflects the truthfulness of the study's findings from the data collected from interviews, notes, and audio recordings from participants in the study (Anney, 2014). In this study, I established credibility through one-on-one interviewing and audio-recordings to elicit descriptive information from the participants on the

phenomenon being investigated. Credibility means that one can have confidence in the qualitative data and in the processes that have been adopted to interpret the data (Johnson, Onwuegbuzie, & Turner, 2007). One way of establishing credibility in qualitative research is to employ respondent validation of their interviews (Harper & Cole, 2012). According to Guba and Lincoln (1981), credibility can best be achieved by using the process of transcript verification. To achieve credibility in my study, I sent each participant a copy of their transcript for verification which allowed the participants to review, correct, or amend their responses. I collected all data to ensure its uniformity. I performed an audit trail to confirm my findings.

Transferability

Transferability was achieved in this study by providing enough detail about methods, data collection, and data analysis to provide other researchers ample opportunity to transfer this study (Bowen, 2005). The research was detailed, so that readers can determine easily if the study can be transferred to their own context. In qualitative research, transferability of results refers to the generalization of the results (Hays, Wood, Dahl, and Kirk-Jenkins, 2016). The participants in my study were mid-level managers who had direct supervision of employees during a merger. I ensured transferability by administering effective probing questions, keeping detailed notes during the interview, and conversations were audio recorded with participants to provide a thick description of the phenomenon (Geetz, 1973; Holloway & Wheeler, 2010; Ryle, 1949). Holloway and Wheeler (2010) described thick description as similarities among people that characterize the patterns of their behavior impacted by cultural and social

relationships and clarify its meaning. I used research aligned probing questions to increase depth and maintain focus in discussion during the interview.

Dependability

Dependability is determined if the results have consistent themes and if the same research process and data collection methods are applied (Billups, 2014). There are several ways a researcher can ensure dependability in a research study. My interview questions for this study were reviewed by the University of Walden dissertation committee members and University Research Review to ensure they were free from bias. All interviews were conducted in the same manner. The dependability of this study refers to the replicability of the results in another research (Thomas & Magilvy, 2011). In this study, dependability was accomplished by using audit trails to verify the accuracy of research participants interview information.

Confirmability

Confirmability in research is the acceptance and accuracy of the study's results reflected by the perspectives of the participants (Anney, 2014). In order to get accurate and factual answers from the participants, I made sure that participants were comfortable and allowed to speak freely. Confirmability is determining if the results are neutral, accurate, can be corroborated, and have minimal researcher bias or reflexivity (Billups, 2014). This dimension of trustworthiness assesses whether the research findings and conclusions reflect the data. In this study, I addressed confirmability by documenting the data collection (for an audit trail) and analysis processes in detail (Albaqami, 2015). This

will confirm that the answers are legitimately those of the participants as they were spoken.

Ethical Procedures

Numerous ethical issues potentially emerge during the conduct of research, particularly in the relationship between researcher and participants (Albaqami, 2015; Merriam, 1998). Walden University expects all research done on humans to be approved by Walden University's Institutional Review Board (IRB). IRB application (Approved No. 02-27-20-0380309) was completed and used to gain access to participant. IRB is useful for the study of human subjects and it makes sure that participants will not be harmed in any way (Jacob & Furgerson, 2012). I ensured ethical treatment of all the participants and all recruitment materials and processes were stored to avoid any issues of privacy and confidentiality.

To protect the rights of the participants and to prevent abuse, informed consent forms were prepared for this research. I sent all participants an informed consent form through email that contains all the information about the purpose of the study, the benefits of the study, and the protection of participant identity. I asked all participants to reply to the original email with the response of "I Consent" to participate in the study. Once the consent form was received, I contacted each participant to schedule the best day and time for the interview. All participants' personal information, including informed consent forms and other identifiable data, were assigned an internal code to conceal their identities. Protecting participants' rights is paramount. I informed the participants of their rights to accept or reject the offer to participate in the study. The participants had the

right to withdraw at any time from the interview process without penalty as stated in the informed consent form. If at any time a participant chose to not participate in the study, the participant could withdraw without penalty and the data collected would be erased from the data collection.

I treated all participants equally and assigned a coded number to protect their identities. An internal coding system ranging from FMLM1(Female Mid-Level Manager Number 1) to MMLM12(Male Mid-Level Manager Number 12) was used to identify each participant to protect their identities and keep their participation confidential. I used all the data collected for this study exclusively for the purpose of my research dissertation. All recorded interviews were transcribed into data notes containing only the coded identification of the participant. The transcribed notes will be stored for five years in a locked file cabinet after the research study has been approved. During the five-year storage time, the confidential transcribed interviews, informed consent and the handwritten notes will remain in the confidential file's cabinet storage in my home and flash drive before being destroyed. Audio recordings and my flash drive content will be erased, and interview notes shredded.

Summary

In Chapter 3, I discussed the research methods in completing the study. The major elements for chapter 3 included the research strategy for answering the research question, and data collection procedures and analysis. A description and explanation of the data procedures, as well as, the role of the researcher, and sampling criterion for selecting participants for the study were presented. Chapter 3 concluded with a detailed description

of the data analysis plan, and the strategies to show the study's trustworthiness and addressed ethical issues.

In chapter 4, I discuss the study's findings from the data obtained from participants' interviews and recorded conversations.

Chapter 4: Results

The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-size information technology firms in California from 2014 to 2019. In this study, data were collected from 12 mid-level managers who provided responses in a semistructured phone interviews. The research narrative documents my analysis of the conversations during these 12 interview sessions to provide a rich and meaningful account of how these managers, in their unique and special roles, experience the day-to-day use of knowledge management assets. This was a phenomenological study using Hycner's (1985) guidelines for the phenomenological analysis of interview data. The guiding research question for this study was the following: What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium-size information technology firms in California from 2014 to 2019? In this chapter, I discuss the field test, research setting, participants' demographics, data collection, data analysis, and evidence of trustworthiness. I also present the results of the study.

Field Test

I conducted a field test of the interview questions to refine my procedures and revise my interview questions. The field test is used to help avoid misleading, inappropriate, or irrelevant questions and to ensure consistency with research instruments (Cook, Beard, Cook, & MacLennan, 2016). The field test participants included three research professionals who analyzed the interview questions to ensure that they were

aligned with the research question. The professionals who participated in the field test were academic professionals with extensive knowledge of qualitative methodology. Because their main purpose was to assess the appropriateness of the projected interview questions, their responses will not be included in the data analysis (see Patton, 2015). I recruited the experts by emailing five prospective participants a solicitation letter (see Appendix A). The experts were able to provide new dimensions and conceptions for consideration (see Maxwell, 2013). The field test also validated and provided adequate information to proceed with the final study. As a result of the field test, three experts recommended adjustments to the interview questions to ensure that they would result in data that would answer the research question. The field test indicated that the interview questions and the sample size were feasible for this study without changes to the protocol.

Research Setting

I used LinkedIn to connect with mid-level managers who have been involved in a merger and acquisition and were older than 18 years of age based on their work history. I first sent an invitation to three LinkedIn professional groups to recruit participants for the study. The assumption was that the 6,157 members across the three groups would yield a sample of participants for the study. The posting yielded 23 positive results about the study. The 23 professionals were sent the consent form by email, but only 12 returned the signed consent email. Eleven potential participants initially showed interest but declined to proceed with the study because of various reasons. One potential participant was

concerned about disclosing information that would cause him to lose his job. Another participant did not want to move forward because of legal reasons.

Demographics

The participants included 12 mid-level managers in the San Francisco Bay Area. Ten of the participants were male, and two were female. The participants' leadership role included sales manager, IT manager, business manager, operations manager, executive, development manager, and managers. The participants' years of M&A experience ranged from 5 to 25. The demographics of the participants are listed in Table 4. To protect their privacy and confidentiality, each participant was assigned a pseudonym. For example, the first female mid-level manager participant was FMLM1, and the third male mid-level manager participant was MMLM3. The pseudonyms were used to ensure the confidentiality of the participants.

Table 4

Demographical Overview of the Study Participants

Participants	Gender	Leadership role	Years of M&A experience
FMLM1	Female	Manager	12 years
FMLM2	Female	Manager	10 years
MMLM3	Male	Manager	16 years
MMLM4	Male	Executive	13 years
MMLM5	Male	Sales manager	5 years
MMLM6	Male	IT manager	25 years
MMLM7	Male	Operations manager	7 years
MMLM8	Male	Development manager	10 years
MMLM9	Male	Business manager	9 years
MMLM10	Male	Manager	12 years
MMLM11	Male	Manager	14 years
MMLM12	Male	Manager	10 years

Data Collection

The data collection phase focused on the quality and richness of the data gathered (see Anyan, 2013). After approval from the Walden University IRB (No. 02-27-20-0380309), I collected data from 12 mid-level managers recruited from LinkedIn. To recruit participants, I extended research invitations to LinkedIn members who possessed a job title of manager. Additionally, I presented the members of four LinkedIn M&A groups the opportunity to participate in the study. I sent 65 emails through LinkedIn to determine the interests of mid-level managers who may have wanted to be involved in the study. Of the 65 recipients and M&A LinkedIn groups, 23 individuals responded as interested participants for the study, but only 12 participated. Each of the 12 participants

received a consent form by email, and I advised each participant to review the terms of the study and to provide email consent of participation. Each of the participants consented through email to participate, and each of the participants also gave consent to be digitally recorded over the phone. Every participant provided potential interview dates and times. The interview time ranged from 30 to 60 minutes.

The interview process took 2 weeks to complete with an average of one interview per day. The participants emailed the best time to call them, and some accepted my proposed time for the interview. Before the start of each interview, I expressed appreciation for their participation and provided a brief overview concerning the study. I repeated the benefits and risks the participant may encounter by participating in the study. I reiterated there would be no compensation for participation in this study. I restated that participation was voluntary. I reemphasized the right to withdraw from the study at any point during the research process without penalty or retaliation. After assurance from each participant of their desire to participate in the study, I initiated the interview. I approached each interview with an open mind to ensure that my experiences, understanding, and biases would be set aside so I would not prejudice the interview responses.

The digital recorder that I used was the Olympus WS-853, which is advertised for recording at meetings. The Olympus WS-853 is user friendly, can record for 2080 hours, and has a storage capacity of 8 gigabytes. I recorded all interviews with the digital recorder. I also maintained a reflective journal as part of this phenomenological study. The purpose of the reflective journal was to keep notes and memos regarding what I

heard and experienced throughout the process. I transcribed each response from the reflective journal onto a Microsoft Word document. At the end of each day, I listened to each audio recording to ensure accuracy, and then I transcribed the interviews verbatim. Hycner (1985) indicated that repetition (going through the recording several times while listening) of the audio recording of each interview is necessary to develop a holistic sense. Next, I conducted transcript verification by sending a copy of each interview transcript to the corresponding participant through email. This gave all 12 participants an opportunity of making any changes to the transcribed data. Conducting a transcript verification helped ensure the research study had accuracy and added credibility to the data collection (see Yin, 2018). All of the transcribed data were verified. The process of transcript verification ensured that data collected were correct and relevant to the study. I began the data analysis immediately after this verification.

After each participant had verified the transcribed interview responses, I entered the data into NVivo software. I watched a video on YouTube to familiarize myself with how to use the NVivo software. I asked for help from a Walden PhD graduate who had used NVivo for her dissertation.

Data Analysis

I used NVivo 12 starter for students for data analysis, and I employed Hycner's (1985) method of phenomenological analysis. The first step of Hycner's (1985) data analysis process was the following:

1. Bracketing and reduction: Bracketing allows the meaning of the data to emerge with the least amount of researcher influence possible during the

reduction of data. This step directs the researcher to identify personal presuppositions as a means of helping the researcher suspend those presuppositions. I looked closely at the information without any presupposition or judgment to allow meaning to emerge and to understand what the participant was saying.

2. Delineating units of meaning: These units include general meaning such as “words, phrases, or para-linguistic which express a unique and coherent meaning” (Hycner, 1985, p. 282). As I continued to bracket my presuppositions, I tried to stay true to the data, as well as have a sense of the whole of the interview as a context. In my attempts to delineate units of meaning, I went over every word, phrase, sentence, and paragraph noting significant communications and made notes to provide coherent meaning for the expressed data.
3. Cluster units of meaning to form themes (in this case participants’ responses): The interview transcripts were read to determine clusters of meaning. At this stage of the research, it was important to bracket and suspend judgment, assumptions, and presuppositions and to present the phenomenon as openly as possible. Significant statements and descriptions were extracted and categorized. Eight emergent themes were identified from the data. Significant statements, thematic descriptions, and verbatim quotes were organized around each theme.
4. Summarizing each interview, validating it, and where necessary modifying it.

5. Extracting general and unique themes from all the interviews and making a composite summary (Hycner, 1985).

In preparation for analyzing the data in NVivo 12, I imported the 12 interview transcripts from Microsoft Word into the NVivo software. NVivo is one of the most popular analysis tools and is ideal for phenomenological work (Langdrige, 2007). I formatted the transcripts to assist in the coding process. I also added the participants' demographic data to the project. Using NVivo 12, I organized, managed, coded, and categorized the data to identify themes, generalizations, and patterns that emerged from the content (see Woods, Paulus, Atkins, & Macklin, 2016). I used NVivo 12 to cluster data into categories and theme linkages and to remove redundant units of data.

I started data analysis by using the NVivo 12's auto-code function to create a node based on the interview questions by grouping the participants' responses to the interview questions. The coding in NVivo was achieved by assigning headings for interview responses to the questions as standard text. The key terms arising from the interviews were used to develop the emerging themes and relating the themes to the lived experiences of the participants. Themes are the way in which a researcher can explain the essence and meaning of the phenomenon based upon the mid-level managers' responses (Creswell, 2009). At the completion of the coding, the NVivo report revealed relevant themes from the data. I reviewed the interview transcripts several times to ensure I captured the themes that emerged from the data. Eight themes emerged from the data analysis. NVivo 12 functioned as a tool I used to understand how data harmonized with the Nonaka and Takeuchi's model. I evaluated the data findings against the conceptual

frameworks that guided this study. The Nonaka and Takeuchi's model served as lenses to explore the data's meaning and to understand its role in the merger-related knowledge management assets used by mid-level managers in the retention of employees.

Evidence of Trustworthiness

Credibility

I achieved credibility by adopting the strategies of bias accountability, reflexivity, transcript verification, and data saturation. Credibility is when a qualitative study is believable based on the information of how the research process was conducted (Hays, Wood, Dahl, & Kirk-Jenkins, 2016). In this study, I acknowledged personal biases, and during the interview process I communicated to the participants any personal or professional characteristics and their significance to the study. I used the technique of reflexivity and reflection to acknowledge my perspectives and minimize research bias. The process of self-reflexivity created a platform to recognize unrealized blind spots (Gilmore & Kenny, 2014).

Transcript verification was another strategy used to validate, improve, and strengthen the quality of the research data (Harvey, 2015). In this stage, I provided the participants with an opportunity to review the accuracy of the interpretations of the information given during the interviews through transcript verification. I sent transcribed interviews to each participant through email, to ensure the accuracy of interpretations, and to validate whether the interpretations captured what participants meant to convey (Birt, Scott, Cavers, Campbell, Walter, 2016).

Data saturation was another technique used to certify the trustworthiness of the study findings. The purpose of data saturation was to validate the replication of the study's findings by another researcher should one desire to repeat or conduct a similar study (Hancock, Amankwaa, Revell, & Mueller, 2016). Data saturation occurred during the data collection after the 10th participant, additional data were not leading to more information, but I followed through with interviews to the 12th participant.

Transferability

Transferability refers to the generalizability of the results to other participants or situation (Hays, Wood, Dahl, & Kirk-Jenkins, 2016). The procedures and process of the entire study was written in great detail. I provided a detailed analysis on how I selected, contacted, and recruited participants from LinkedIn. How the interview protocol and the conceptual framework were aligned was explained. I have also addressed how the interested participants received a consent form by emails as well as how I conducted phone interviews. I have presented how I verified the transcribed data with the participants through transcript verification and how I used NVivo software for data analysis. I also addressed how I analyzed the themes for each coded node and summarized them to make conclusions on the study results.

Dependability

Dependability is when a study can result in similar results among other researchers (Hays, Wood, Dahl, & Kirk-Jenkins, 2016). To foster dependability of the study, the transcribed data from the participants had to be accurate before being coded with NVivo software. The participants also had an opportunity to review all transcribed

notes. Each participant had enough time to perform the Transcript verification procedure by verifying his or her transcribed data for accuracy. Only after the transcript verification process was conducted successfully did I code each transcribed data into the NVivo software to derive the main themes from the coded nodes. Dependability was also achieved through the conduct of a field test to determine the acceptability of the interview questions and the interview process. The field test also served as expert validating the capability of the interview questions generating responses that would answer the research questions.

Confirmability

Confirmability refers to the interpretation of participants' perceptions without the bias of the researcher (Hays, Wood, Dahl, & Kirk-Jenkins, 2016). To ensure confirmability, I explained in detail how the interpretations and outcomes were derived. I demonstrated confirmability by using rich quotes from the participants that illustrated the emerging perspectives, patterns, and themes. I employed transcript verification processes to validate that the study's findings exemplified the participants' perspectives and captured what the participants meant to convey. The entire interview was digitally recorded, and handwritten field notes were taken for comparison.

Study Results

The results of this study are organized by major themes and then further divided by the responses of mid-level managers. This framework provides an opportunity to elicit and analyze essential themes from the data. Each theme is explored and relevant quotations from each of the research participants are provided. To understand the merger-

related knowledge management assets used by mid-level managers in the retention of employees, the focus of the study was on a central research question:

RQ: What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium sized information technology firms in California from 2014–2019?

Figure 3 below was developed to show the eight major themes that evolved out of the semi-structured interviews and to help answer research question 1.

Research Question (RQ)
What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium sized information technology firms in California from 2014-2019?

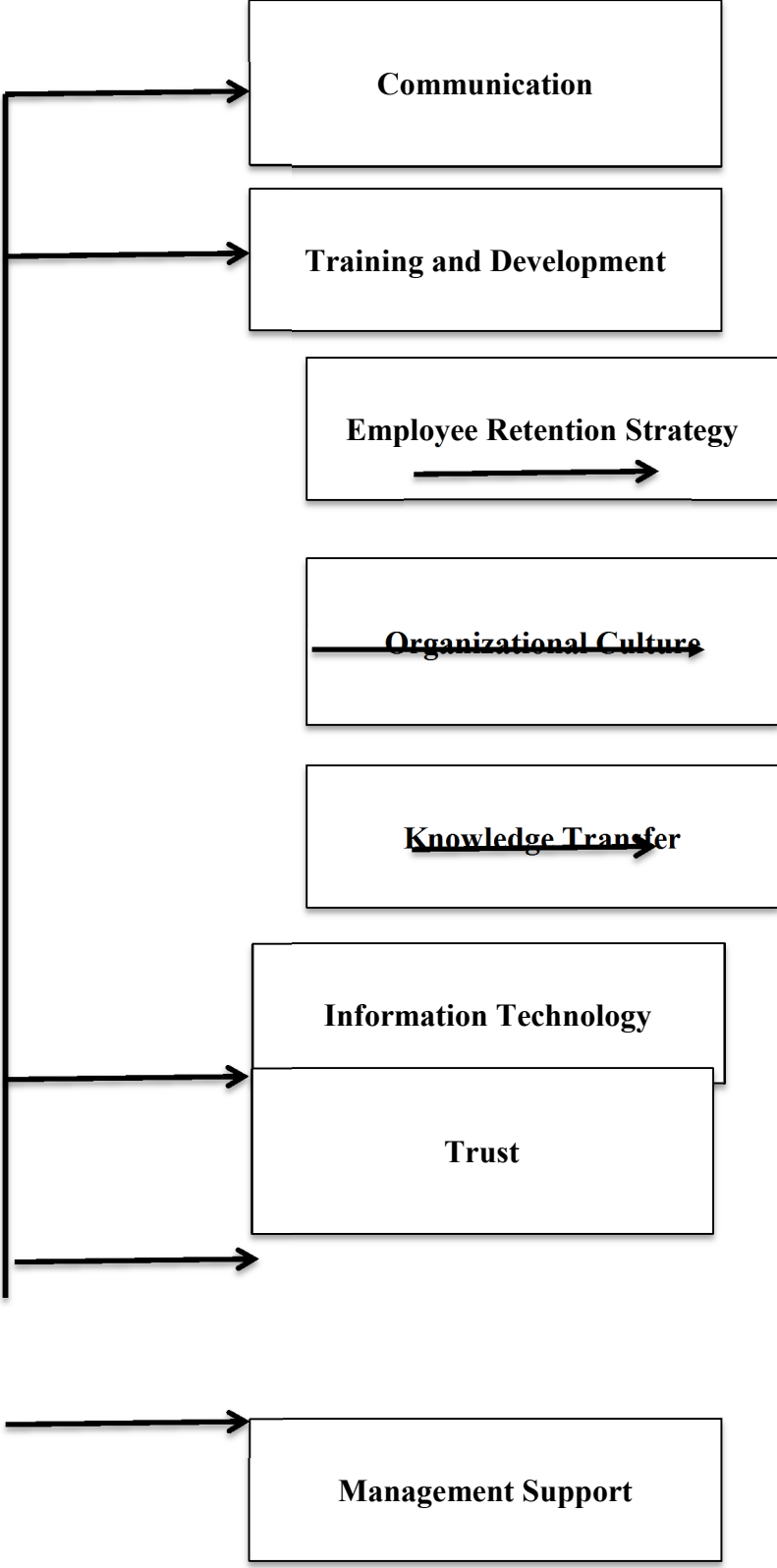


Figure 3. Paired research question and themes.

Table 5

Research Themes and Frequency

Themes	Frequency	%
Communication	15	100
Training and Development	14	90
Employee Retention Strategy	13	85
Organizational Culture	12	80
Knowledge Transfer	12	80
Information Technology	10	70
Trust	9	65
Management Support	8	60

Theme 1: Communication

The participants responded to using communication as a resource to retain employees. All participants mentioned communication when they answered the interview questions 1 and 2. One of the components outlined by the participants for M&A integrations is to communicate to employees what knowledge was needed going forward and to ensure that the knowledge was transferred to the right employees. Some participants stated that managers of the merging organizations must ensure there is open and honest communication about their respective organizations. From the interviews, most of the participants stated that communication is essential for knowledge transfer within an organization. Eight participants stated that managers within both organizations must possess the ability to articulate the direction of the organization and the value employees bring to the success of the combined organization. All 12 participants mentioned communication during the interview and highlighted the importance of clearly stating the desired outcome. The following comments provided support for Theme 1:

MMLM7. This participant mentioned the importance of communication for conveying tacit knowledge. “Communication is key to build networks with people” “We have common communities of interest where we share information. It is important to build networks and I encourage my employees to build bridges with others within those communities”. “Sharing knowledge is very important.”

MMLM10. “I think it is a managers responsibility to be aware of what is going on and to take the trouble to communicate with your employees and participate in various technical forums” At the core of any organization is communication. If one of my

employees feel like they are not getting the information they need to do their job, I will ask, “What is your preferred method of communication?”

MMLM6. It is about communicating and building understanding and building employees commitment. “Knowledge is acquired through talking to your colleagues”

Theme 2: Training and Development

The second knowledge management asset resources mid-level managers use to retain employees is training and development. In question 9,10, and 11, 90% of the participants mentioned training and development. They managers stated that training and development of employees was critical to successfully implement knowledge management. All 12 participants stated that ongoing training and education play a key role in keeping employees up-to-date and reduce the uncertainties and complexities knowledge workers might face in a M&A. This theme was defined as the use of hands-on training to facilitate the transfer of tacit knowledge. The managers believed that training creates a platform for employee development, innovation and creativity where knowledge can be easily transferred and shared between people. It provides both employees and managers with the skills and information they need to fulfill their everyday responsibilities. The following comments provided support for Theme 2:

FMLM1. “Whenever a new employee is hired, or someone takes a new position it is always best practice to have him or her shadow a seasoned employee”. Due to some of the intricacies and specialized application in what we do, it is very helpful to have the new employee shadow for at least two to three weeks depending on the position. We have training schedule for new employees on what they should learn in those first few weeks.

Participant FMLM1 stated, “Working with people leads to training. Many organizations have become learning organizations. These organizations view training as a long-term investment rather than a cost”.

MMLM4. “For an organization to be truly knowledge-based, it must support its activities with quality training and education”. Management must utilize their expertise in training and development to identify the needs of their organizations and its employees. Also analyze how they can contribute to the knowledge management and resources and ensure their continued involvement in knowledge management. “All my staff are encouraged to be involved in seminars or training that is very specific to what we do. When employees go for training, they gain knowledge that benefit the organization”.

MMLM11. “I believe a well-informed workforce is the key in competitive advantage for any organization”. A strategic goal for organizations is to continually improve their overall performance to satisfy these requirements. This is achieved by sharing knowledge among employees and employees can acquire new knowledge by on the job training, and vendor training. Participant MMLM11 implied training with references to “On the job training and mentoring, workshops are all very important for self-development”.

Theme 3: Employee Retention Strategy

The third knowledge management assets resources mid-level managers use to retain employees during an M&A is employee retention strategy. In this study, 85% of the participants mentioned employee retention strategy when they answered the interview questions 6, 9, and 10. In order to sustain an organization, tacit knowledge must reside in

organizational knowledge banks. Employee retention helps to protect intellectual capital during M&A. All the participants recognized the importance to retain employees, because they would play a key role in knowledge transfer, which would eventually make the M&A successful. Employees are crucial to the organization and to the success of the M&A, but they could walk out the door at any time. In addition, the new organization needed to retain key employees who had strong understanding of the products, technologies, and the market to preserve the knowledge. Retaining key employees was given a priority. Participants stated that to prevent employees from leaving, they were identified and put under a retention plan. The retention bonus was given to them as an incentive to stay, at least for the period necessary to replace them, if they wanted to leave. In my findings, retaining key employees was given a priority. The following comments provided support for Theme 3:

MMLM6: “At the end of the day our business is people, but people can walk out of the door tomorrow” “The biggest factor for a successful knowledge transfer was the retention of people.

MMLM9: “Part of the process is to identify who the great people are, making sure they’re on retention programs, making sure that they’re incented to stay as long as it takes to get someone else familiar with what they’re doing”

MMLM11: “A lot of know-how was in people who developed a lot of experience over time. So when you transfer knowledge, people are extremely important”. “We offered stay bonuses to encourage them to stay and work with us, so that the transition was as clean as it could be, with a minimal amount of disruption”.

Theme 4: Organizational Culture

The fourth knowledge management asset resources mid-level managers use to retain employees is organizational culture. Eighty percent of participants mentioned organizational culture when they answered the interview questions 1, 2 and 4. Culture provides an identity or character for the organization on how things are done within the organization. Organizational culture was characterized as the willingness to change, high tolerance of uncertainty and flexibility of operation. The participants stated that organizational culture is central to a successful implementation of knowledge management. They noted that in an M&A, the biggest challenge facing most knowledge management efforts lay in developing a culture that is supportive of learning and innovation. The following comments provided support for theme number 4:

FMLM1. Participant FMLM1 stated that knowledge sharing happened when people with similar belief systems and a common goal came together. “A friendly culture reflects how an organization views and facilitates learning by promoting knowledge generation”. Culture is a key component of managing organizational change and stability. Participant FMLM1 highlighted that since knowledge management is an example of such change, culture was identified as a dominant factor in the implementation of knowledge management.

MMLM3. Participant MMLM3 highlighted the role of cultural learning. “Nurturing a culture of learning is necessary for today’s organizations to implement knowledge creation and foster knowledge sharing”. He elaborated on how his company conducted a cultural assessment to learn about similarities and differences of the two

companies during M&A. The company used the assessment later to tailor communication to employees. “For a knowledge-centric organization to perform successfully and gain competitive advantage, a workplace climate and culture of learning that views knowledge as an institutional asset is required”.

MMLM7. Participant MMLM7 stated the importance of alignment of values and culture. “So, if you deal with people that are friendly and interactive, one is dealing with people that are like-minded. “A collaborative environment sometimes has an ability to be a sort of a fuse” To align culture and values, there needs to be a common set of shared beliefs. He mentioned that alignment was critical, and that attitude plays a critical role in an organization. A culture that respects alignment of values, privacy, equality and involvement has the potential to promote communication, trust, and new ideas can be easily shared. “I think team-building activities would also be great for the knowledge sharing process”.

Theme 5: Knowledge Transfer

The fifth knowledge management asset resources mid-level managers use to retain employees is knowledge transfer. In this study, 80% of the participants mentioned knowledge transfer when they answered the interview questions 6, 7, and 8. This theme created significant results regarding the mid-level managers perceptions of how tacit and explicit knowledge enhances knowledge transfer. Knowledge can be divided into tacit and explicit knowledge. Some participants stated that knowledge transfer as a part of knowledge management should be the goal of any organization whose leaders aspire to protect its intellectual capital. Results indicated that employees transfer and share

knowledge, but on a limited basis. Eighty percent of participants reported that knowledge sharing occurs through unofficial mentoring. The following comments provided support for Theme 5:

FMLM2. “I think one-on-one is the best way to transfer knowledge”. “The one-on-one mentoring type of sharing is the best way to transfer knowledge among employees”.

MMLM10. Participant MMLM10 mentioned the importance of time and resources allocated for knowledge transfer. “If you work in a big company, you don’t get the information delivered on a silver plate. One really has to look for the information and search for the information at different areas”.

MMLM5. Participant mentioned that coordinated meetings are an integral part of knowledge transfer during an M&A. “I think it is important to have structure and regularity in those communications. Make sure that we have good governance set up so that those work streams are communicating and interacting, besides just reporting back on status”.

Theme 6: Information Technology

The sixth knowledge management asset resources mid-level managers use to retain employees is information technology. All participants mentioned information technology when they answered interview questions 5, 6, 7 and 8. In this study, 70% of the participants interviewed mentioned the importance of information technology for M&A integrations and knowledge management when they answered the interview questions. The uses of information technology tools have been well researched in

knowledge management and much of the research has focused on the sole use of technology to transfer knowledge. The participants described lived experiences relating to the effect of information technology and its role in the practice of knowledge management within their organizations. They identified information technology as one of the most critical factors for knowledge management success. Seventy percent of the participants agreed that information technology largely affects externalization. Externalization is the process of transferring tacit knowledge into explicit knowledge. When externalization occurs, knowledge is documented and made explicit, making it easier for others to share. The following comments provided support for Theme 6:

MMLM6. “Information technology is an extremely important tool to support knowledge management initiatives, enabling employees and management to communicate better”. It should not, however, be the basis of the initiative itself. Information technology should be used as reinforcement in the implementation of knowledge management initiatives. “Information technology supports knowledge preservation and accumulation”. Participant MMLM6 noted methods for enhancing knowledge transfer; for example, intranets, twitter, RSS feeds, virtual meetings, emails, newsletters, IM, and webcasts.

MMLM8. “Knowledge cannot be simply stored, transferred or exchanged without an effective and efficient information technology system in place”. Technology has the potential to empower employees to facilitate knowledge sharing within the organization. Participant MMLM8 stated, “With hardware and software information

technologies such as intranet, virtual communities of practice can be created thereby facilitating interactions and increasing the scope of knowledge sharing and creation”.

MMLM12. Positive reinforcement and motivation in using Information and communication technology influence the practice of knowledge management. “The use of technology for knowledge management has included both in-person and virtual methods in today’s work environment”. “Organizations should encourage the use of technologies such as video conferencing, electronic forums, and social media like twitter and Facebook to share tacit knowledge”. Participant MMLM12 noted that these tools produce a dynamic information infrastructure that facilitate effective communication and processing of data, thereby easier and faster sharing of information. “Social media has the potential for expediting the exchange of tacit knowledge, which is a necessity of businesses”. Social media plays a key role in validating one’s research findings as it enables individuals to collect, communicate, respond, and interpret data and information.

Theme 7: Trust

The seventh knowledge management asset resources mid-level managers use to retain employees during an M&A is trust. In this study, 65% of the participants mentioned trust when they answered interview questions 2, 6, and 9. Trust is based on one’s expectations of another and is therefore formed in the conscious mind. As stated by the participants, a knowledge-centered culture, inspired, and motivated by trust, stimulates innovation. In this study, 65% of participants reported that trust is essential to knowledge sharing. The following comments provided support for Theme 7:

FMLM2. “When employees develop work relationships based on affective trust their ability and willingness to share tacit knowledge in their organization will increase”. “I think that if there is no trust, there will be no knowledge transfer”. “You need a general environment in which people are comfortable with each other, and you only gain that if people really know each other because when you get to know each other, you begin to respect each other, and when there is respect, there is trust”.

MMLM5. “Organizations that develop a high level of trust and cooperation among employees and managers will be more likely to transfer tacit knowledge”. “Trust has a huge impact on the knowledge sharing process. The more you trust someone, the more willing you are to share knowledge one way or another. I think trust affects the knowledge sharing process”

MMLM11. “Employees have to trust the person they are working with be it a manager, mentor, or whoever. Trust influences knowledge sharing between the inexperienced and experienced employees”.

Theme 8: Management Support

The eight knowledge management asset resources mid-level managers use to retain employees is management support. Sixty percent of the participants mentioned management support when they answered the interview questions. Managers play a crucial role in making sure that employees understand all aspects of the knowledge management process to execute the mission of the organization effectively. Participants noted that managers must provide the time and training to facilitate the knowledge sharing process. To enhance knowledge sharing throughout the organization, the

managers in supervisory positions could provide more hands-on assistance to the inexperienced employees. Having managers open and willing to share, encourage employees to assist each other, and encourage employees to ask questions without criticism or fear of retribution is critical to the knowledge management process within the organization. Results of the interview also indicated an area of concern relating to management support that could affect and be a potential barrier to the knowledge management process within the organization. In this study, 20% of the participants noted a lack of management support. The participants noted a lack of management support as a factor that could negatively affect the knowledge management process within the organization. The following comments provided support for theme 8:

MMLM6. “Managers play a part in supporting knowledge management by just getting together with the workers and trying to make sure they have the right people to train them for the type of work they do” “It is important to have someone that has a thorough knowledge if they have questions, who to go to.”

MMLM7. “Expressive managers generally enhance knowledge management”. “Managers who relate well to the employees as opposed to introverted leaders”. “It is important to have managers who passionately believe in sharing knowledge”. If management do not believe in sharing knowledge, they will not promote it”.

MMLM11. “I think I want to see management get more involved. They hold knowledge as well as years of contracting experience in Silicon Valley. “I think information sometimes when filtered down, you have different stages and individuals, and when it gets to the person how is information really expressed to employees.”

MMLM12. “Some of the negative effects of knowledge sharing is how management treats employees” “Does management value you as an asset or liability? If they consider you as a liability, they are not going to encourage knowledge sharing with you”.

Summary

In summary, Chapter 4 contains a discussion of the data collection methods and data analysis of the findings of the lived experiences through phone interviews, using 11 semi-structured interview questions from 12 mid-level managers in Silicon Valley, California. The in-depth interviews provided rich descriptions of the phenomenon and were digitally recorded, transcribed, coded, and analyzed. The data analysis followed Hycner’s (1985) method of phenomenological analysis. NVivo 12 application software was used to facilitate the phenomenological reduction process and to create the data structure. The overall research was guided by the central research question: What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium sized information technology firms in California from 2014–2019? Through data analysis, eight themes emerged : (a) Communication, (b) Training and Development, (c) Employee Retention Strategy, (d) Organizational Culture, (e) Knowledge Transfer, (f) Information Technology, (g) Trust, (h) Management Support.

In Chapter 5, I interpreted the findings, discuss the limitations of the study, and present recommendations from the study. I finally address the implications and conclusions of the study. In this final chapter, readers should be enlightened about the

merger-related knowledge management assets used by mid-level managers in the retention of employees.

Chapter 5: Discussion, Conclusions, and Recommendations

The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-size information technology firms in California from 2014 to 2019. I recruited mid-level managers on LinkedIn to participate in the study and received consent from 12 mid-level managers. I used the descriptive phenomenological research design to understand the essence of the participants' perceived lived experiences.

The findings of the research revealed eight themes that I used to answer the research question: (a) communication, (b) training and development, (c) employee retention strategy, (d) organizational culture, (e) knowledge transfer, (f) information technology, (g) trust, and (h) management support. The results revealed a consensus from the participants that there are many knowledge management assets available to mid-level managers to assist in the retention of employees. My research findings revealed that managers are a great resource, along with other organizational resources. The analysis of findings is linked to the conceptual framework that guided the study. Chapter 5 includes an interpretation of the findings, limitations of the study, recommendations for further research, implications for positive social change, and a conclusion.

Interpretation of Findings

The conceptual framework for the study was Nonaka and Takeuchi's (1995) organizational knowledge creation and transfer. Nonaka and Takeuchi argued that when tacit knowledge is transferred, it goes through four forms of knowledge conversion:

socialization (tacit to tacit knowledge), internalization (explicit to tacit knowledge), externalization (tacit to explicit knowledge), and combination (explicit to explicit knowledge). By implementing tacit knowledge transfer processes, organizations can fill the gaps about the importance of knowledge management assets and the influence that implementation has on business, which is critical for positive social change. Continuing to a broader concept of knowledge, Polanyi (1966) focused on the importance and complexity of tacit knowledge. Polanyi opposed the thought of knowledge management and noted that the knowledge people possess in their minds is too complex to manage. Knowledge of the tacit dimension is embedded in a person's head, unstructured, and inarticulate. In addition, Polanyi stated that tacit knowledge means hidden knowledge (knowledge a person is unaware of). Polanyi noted that tacit knowledge can be explained using basic concepts such as swimming and bicycle riding. Riding a bicycle requires some coordinated mental effort to maintain balance on the bicycle while riding, whereas swimming requires some coordination of the muscles and strokes in certain intervals (Polanyi, 1966). Sanchez (1997) indicated that an organization's tacit knowledge is more likely to be a source of competitive advantage than its explicit knowledge. Prusak and Davenport (1997) approach to knowledge is that it is not possible to manage it; rather, organizations manage the environment that is made up of people, processes, and technology to optimize knowledge and operational performance. This discussion below Table 6 shows how the themes discovered in this study are related to Nonaka and Takeuchi's tacit knowledge conversion phases.

Table 6

Nonaka and Takeuch's Tacit Knowledge Conversion Phases (SECI)

Category	Knowledge Conversion Type	Activity
Socialization	Tacit to Tacit	Knowledge transfer through associate interaction.
Internalization	Explicit to Tacit	Converting documented knowledge into hands on job experience.
Externalization	Tacit to Explicit	Converting acquired knowledge into documents.
Combination	Explicit to Explicit	Converting documented knowledge into more explicit documents and systems

The knowledge transfer conversion model is interwoven into the analysis that follows. The research question that guided the study was the following: What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium-size information technology firms in California from 2014 to 2019? The eight themes identified from the findings were used to answer the research question.

Emergent Theme 1: Communication

I found that a merger success or failure depends on the management's ability to communicate the direction, vision, and mission of the organization at all levels within the organization. The literature on mergers and acquisitions indicated that communication is an important determinant of merger success or failure. Adomako et al. (2013) suggested that effective communication had a positive impact on the M&A process. The current

study results supported the literature on M&A related to communication. The participants reported that the pivotal role of mid-level managers is to bridge communication gaps among employees during M&A and to cross-pollinate tacit knowledge transfer activities throughout the organization (see Riege & Zulpo, 2007). The communication theme refers to the use of various forms of communication (e.g., emails, face-to-face, telephones, social media) to facilitate transfer of explicit knowledge. This theme was mentioned 42 times in 12 interviews. I found that management must possess the ability to articulate the direction of the organization and the value employees bring to the success of the combined organization. When employees work as a team, the team members can better communicate with one another, thereby establishing effective knowledge sharing practices (see Ding et al., 2014). Communication was mentioned by several participants as one of the core strategies that helped the merger success of organizations. Participants also mentioned that communication is important for the transfer of explicit knowledge. The participants elaborated on the importance of keeping communication consistent because it helps to build trust in an organization. The participants noted the importance of having consistent messages across the different communication channels. Consistent communication smooths the knowledge transfer between employees and mid-level managers.

This study result is consistent with previous literature. Previous research highlighted the importance of open and clear communication within the organization to encourage knowledge transfer. Noruzy, Dalfard, Azhdari, Nazari-Shirkouhi, and Rezazadeh (2013) stated that the function of management is to share fundamental

knowledge among employees by initiating communication, encouraging flexibility, and displaying the transformational characteristics that contribute to success through effective decision-making. The communication that people have with each other results in learning and the transfer of knowledge (Rahman & Muktar, 2014). Existing literature indicated that communication is essential not only for knowledge management but also for the organization as a whole. W. Chen et al. (2016) stated that effective communication reflects effective information sharing, which develops over time and leads to efficient decision-making. With effective communication channels in place, knowledge sharing becomes easy. All of these elements discussed above are derived from the organizational culture. An organization culture that lacks communication channels cannot motivate its employees to trust each other and share learning activities. The core of successful knowledge management lies in the interaction and socialization so that information and knowledge can be shared through efficient communication channels (Andreeva & Ikhiklchik, 2011). The absence of communication channels also makes it difficult for management (Murray & Peyrefitte, 2007).

Emergent Theme 2: Training and Development

I found that to sustain tacit and explicit knowledge, mid-level managers of the organizations promoted continuous training and development and were also mindful of the quality of knowledge that employees acquired and the quality of knowledge that they brought on board. This is consistent with findings from Chumjit, (2013). This theme was defined as the use of hands-on training to facilitate the transfer of tacit knowledge. Organizations often implement multiple ways of learning, including formal learning,

online learning, self-paced learning, learning through dialogue with peers, learning through understanding and experience, and learning from observing others perform work (Littlejohn, Margarayn, & Milligan, 2011). Nonaka and Takeuchi (2000) referred to this practice as internalization, which converts explicit knowledge to tacit knowledge. Nonaka and Takeuchi noted that tacit knowledge conversion occurs best in work situations in which participants spend more time together and through shared experiences. This social learning fosters increased levels of productivity (Gharajedaghi, 2006).

The current study results supported the literature in training and development. Several factors contribute to and support knowledge management in the organization, including formal structured group training, hands-on training, and one-on-one training. Through training, employees can gain the knowledge and skills they need to perform activities that can increase flexibility, capability, and value within their organization (Tyagi, Cai, Yang, & Chambers, 2015). All of the current study participants agreed that training promoted socialization through on-the-job training, team interaction, mentoring, and professional development and internalization through training programs, workshops, and seminars.

Internalization is the type of knowledge transfer that occurs when employees put knowledge into practice (Nonaka et al., 2000). This usually happens when employees participate in hands-on training and development. The results from my research revealed that employees learn best by doing, and employees practice internalization that results from training activities. Mid-level managers use job rotation and one-on-one coaching of employees to instill job skills as part of internalization. New employees shadow

experienced employees as part of training, and some employees participate in training courses.

Socialization represents the act of tacit knowledge transfer by association (Nonaka et al., 2000). Socialization is based on human interactions. This type of knowledge conversion occurs best in work situations in which participants spend more time with expert knowledge owners to share experiences (Nonaka et al., 2000). The current study results revealed that socialization occurred in the organization through group approaches that include teaming and brainstorming and sharing previous experiences. The results also showed that retention of knowledge management was needed to ensure M&A success. During a merger, both organizations must assess knowledge transfer in alignment with the company requirements.

Previous research highlighted the importance of preserving intellectual capital through training and development. Training and development of employees have two interrelated impacts on the organization: increasing the knowledge base of the workforce and motivating the workforce. Motivating the workforce can facilitate the process of knowledge management because explicit knowledge gained during training can be shared to make it tacit knowledge. Training and development are key influences on the overall development of knowledge-based organizations (Hislop, 2013).

Emergent Theme 3: Employee Retention Strategy

I found that management committed a lot of resources to ensure the integration was smooth and objectives were attained. There was a range of measures that were implemented during M&A to address integration issues. Previous research indicated that

most M&As failed due to inadequate integration planning, insensitivity to human factors, and cultural differences (Patel & Kagalwala, 2012). The results of the current study supported the literature. I found that measures to retain employees are a major management intervention during an M&A. Eighty five percent of participants indicated that the retention issues might influence the knowledge transfer and M&A outcome. The importance of the retention of key employees is confirmed in the literature. In technology-based industries, technological knowledge resides mainly in human employees in two ways: in individual employees and in the organization's collective human capital. In the current study, 85% of participants indicated that there was the intention to retain acquired organizations key employees who were seen as the agents of knowledge transfer. MMLM6 stated that key employees are important to the success of the business and the M&A. The new company would take whatever action to make sure that they did not walk out the door and the knowledge was preserved.

I found that the extent to which the retention issues truly impact the integration depends on how effectively they are addressed by management during the integration. A common measure addressing retention issues is the incentives for employees to stay with the new company. There were financial incentives and severance packages for people who had lost or were going to lose their jobs. I found that the benefits of having a severance package is that, although the impact of losing jobs on an individual's productivity cannot be eliminated, giving people some monetary compensation reduces its impact. Some participants noted that companies rely heavily on the "to-be-terminated" employees and their know-how to transfer knowledge.

Existing literature confirms that the retention of employee's is positively associated with the transfer of knowledge-based resources (Ranft & Lord, 2000). Previous studies showed that the departure of key people would cause adverse change and loss to the organization's knowledge-based capabilities and reluctance of employees to share knowledge transferred (Greenberg and Guian, 2003).

Emergent Theme 4: Organizational Culture

The findings from this research are consistent with those of previous that emphasized the importance of organizational culture in successful implementation of knowledge transfer of tacit knowledge to explicit knowledge. I found that an open organizational and knowledge friendly culture was a key enabler of successful implementation of knowledge management. Weber and Tarba (2012) suggested the assessment of cultural differences and measurements during all phases of the merger will enhance the M&A success. Bajaj (2018) suggested organizational culture is a major cause of failure of M&A. The integration of culture in an organizational working environment improves the performance and success of the company (Smith, 2001). The results of the study supported the literature on M&As related to culture. A supportive knowledge sharing culture promotes the interaction and socialization between employees, distinguished by trust, and openness and willingness to share information (Chow, 2012). The organizational culture also includes organizational goals and scope, performance criteria, position of power, decision-making orientation, compliance and management styles (Abebe, 2016). The results of this study supported the importance of culture in the combination process of Nonaka and Takeuchi knowledge conversion model. The

participants viewed culture as essential for facilitating the combination, explicit to explicit, mode of knowledge transfer. Culture played a key role in successful implementation of knowledge management as it could modify or enhance social processes in which individuals collaborated.

Organizational culture was also pivotal to the success of the internalization explicit to tacit mode of knowledge transfer according to the participants. The internalization process of knowledge transfer is affected by organizational culture when employees have freedom, democracy, and openness to learn by doing. When a culture of democracy is supported within organizations, employees can engage in social activities and mutual work. Such an open culture will nurture the learning process. This is consistent with Nonaka and Takeuchi (1999) findings that conversion occurs when explicit knowledge is embodied in action and internalized through learning by doing at an organizational level. I found that with the use of information technology, culture can enhance the learning process and can reinforce the acquisition of new knowledge.

These findings are supported by existing literature. Jeng and Dunk (2013) reported that organizational culture shapes the internalization process by enhancing learning by doing. Organizational culture makes a significant contribution to the implementation of knowledge management resources, but the extent to which this occurs is dependent on manager's motivation, collaboration, and trust among employees. Without these factors in place, it would be very difficult to successfully implement knowledge management initiatives. The findings support previous evidence on knowledge management and confirm the significance of culture as an enabler of

knowledge transfer. Anggia, Sensuse, Sucahyo, & Rohajawati (2013) noted that a positive organizational culture is an essential success factor for knowledge management implementation. Andreeva and Ikhilchik (2011) argued that the SECI model should be embedded in organizational culture to increase efficiency of knowledge management.

Emergent Theme 5: Knowledge Transfer

The findings from the fifth theme dealt with the success of knowledge transfer as related to retention issues. Knowledge can be divided into tacit and explicit knowledge. Tacit knowledge centers on an individual's experiences and values, is difficult to verbalize and resides in an individual's mind (Chow, 2012). Explicit knowledge means the codification, formalization, and recorded information transferred between employees (Chow, 2012). I found that if the new organization could effectively retain key employees, the knowledge based technological resources could be preserved and more easily and effectively transferred. Eighty percent participants stated that knowledge transfer from an Information technology perspective was often tied to data conversion, but close interaction with the acquired company was needed to articulate what was needed, in what form it was needed, and when it was needed. I found that knowledge transfer happened not only between information technology and the business, but also between the different stakeholders. In my findings, M&A requires specific knowledge transfer to make integrations successful.

These findings are supported by existing literature. While knowledge can be transferred easily among individuals, the exchange becomes more complex at various levels of an organization (Argote & Ingram, 2000). Girdauskiene and Savaneviciene

(2015) stated that knowledge management should be an integrated part of M&A strategies to make knowledge transfer a transparent routine and not an added task.

Emergent Theme 6: Information Technology

I found that information technology plays a key role in the practice of knowledge management. Information technology is an important tool to support knowledge management initiatives, enabling individuals to communicate and collaborate. The findings from this study support existing literature that organizations that use information technology to store and transfer documented explicit knowledge promote continuous learning. Some scholars argue that proper implementation of knowledge management is impossible without technological infrastructure (Moffett, McAdam, & Parkinson, 2003). In a survey of top executives by Stivers, Mondada, & Steensig, (1997), for example, participants identified information technology as one of the most critical factors for knowledge management. Explicit knowledge refers to documented and codified data. Explicit knowledge refers to the process of storing, codifying, and documenting organizational knowledge for future use by employees. This process is referred to as externalization, or the process of converting tacit knowledge to explicit knowledge. Technology is important for knowledge management (Razmerita et. al., 2016). By using technology, employees can share knowledge throughout their organization (Razmerita et al., 2016).

The findings of this study have contributed to existing knowledge by identifying the role of information technology in the implementation of knowledge management assets resources. Information technology contributed to externalization tacit to explicit by

contributing to knowledge transfer. I found that communication, computer systems and software, data and information sharing, documents and materials, meetings, and intellectual property play a vital role in knowledge transfer since they enable employees to share information, communicate explicit knowledge and create new ideas and innovation.

Emergent Theme 7: Trust

The seventh theme dealt with the importance of trust as related to the knowledge management process in M&A. I found that to build trust management had to communicate the M&A goals to employees and the intentions of the organization. All the participants proposed that trust is essential to knowledge transfer. Trust is an important part of tacit knowledge transfer. A review of the literature demonstrated that the transfer of tacit knowledge relied heavily on trust. Previous research highlighted trust as the most critical component needed for knowledge sharing to exist and thrive within the organization (Engle & Engle, 2010). A mutual relationship of trust, and respect needs to exist throughout the organization, between employees, supervisors, and top management, prior to individuals completely engaging in the knowledge transfer process (Engle & Engle, 2010). The level of trust that exists between the organization and its employees greatly influences the amount of knowledge that flows from individual to individual into the organizations' databases and best practices (Long & Fahey, 2000). In the tacit knowledge process, trust in co-workers is believed to mediate the link between social network and knowledge transfer. In the study findings, to create a feeling of trust among employees, it is managements' responsibility to create an organizational culture where

employees are encouraged to express their feelings and opinions. I found that the experience of trust evolves from interactions of individuals' values, attitudes, moods, and emotions. An individual's values provide standards for trust that people strive to achieve in their relationships with others. Attitudes provide knowledge of another person's trustworthiness, and current moods and emotions are signals of trust in a relationship. In an organization, the affective trust that can develop through the interactions of individuals in the workplace encourages mid-level managers and employees to cultivate trustworthiness with each other. Once employees develop these feelings of affective trust, they will be more willing to transfer tacit knowledge. For an organization to have the capability to develop synergy among their employees, which will lead to the sharing of tacit knowledge, individuals must develop affective trust with each other (Douglas & Zivnuska, 2008).

Emergent Theme 8: Management Support

Managers play an important role in M&A integration. I found that management decisions had a direct impact on the M&A integration and on knowledge management. The participants described an exemplar leader who managed to motivate and retain a team of highly qualified employees. Participants in this study reported that managers affect the internalization mode of knowledge transfer when employees are encouraged to attend formal and informal meetings. Managements encourages learning-by-doing through courses, workshops, on-the-job training, meetings, and research.

This is consistent with the findings of Nonaka and Takeuchi (1998), that conversion occurs when explicit knowledge is embodied in action and internalized

through “learning by doing” (p.45) at an individual or organizational level. Management commitment and support was shown to be critical to the success of almost any knowledge management initiative within the organization. Previous research identified management support as an enabler of knowledge management, in that managers integrate the use of knowledge into their mission and vision and build a culture of trust that regards knowledge as a vital resource (Abebe & Onyisi, 2016). Existing literature confirms that knowledge inherent in an organization is a valuable asset which is becoming increasingly vital for competitive advantage, and that leaders have recognized employees knowledge as a critical resource for this purpose (Conley & Zheng, 2009). It is important for mid-level managers to reinforce programs that facilitate proper implementation of knowledge management.

Limitations of the Study

In the limitation section, I outlined the potential weaknesses of a research initiative and framed the research effort (Brutus, Aguinis, & Wassmer, 2013). My research study had three limitations that I identified: sample size, geographical location, and professional affiliation. The first limitation is the sample size of the study. The sample size of 12 mid-level managers participated in the research reduced the capacity to transfer the findings of the study beyond the participants. In this study, one of the requirements was that a participant is a manager and work or have worked in the Information Technology industry. The second limitation was that the study involved a population of mid-level managers who had been involved in a merger and acquisition and were located in the San Francisco, California area. In this study, I did not allow

comparison of participants from other geographical areas or states therefore restricted the population size. The interview responses received from the participants were similar in nature, because of the same industry experience and professional affiliations. The third limitation was that the study required participants to be a manager. The study excluded non-officers and participation of individuals from other industries.

Recommendations

The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-sized information technology firms in California from 2014-2019. The study was limited in geographical scope, and future researchers could conduct a study in other states in the United States. I recommend other researchers could increase the sample size and could also apply a quantitative or mixed methods approach. Other researchers may prefer a different research method such as a case study. A case study focuses on examining a specific phenomenon in its real-life context. Future researchers could explore how knowledge management initiatives are implemented in M&As. Researchers can include other organizations in order to widen sampling so that knowledge management assets can be assessed in different work environment not just IT companies. It will be useful to test the application of the model in different situations in order to investigate how effective it accounts for successful implementation of knowledge management.

Mid-level managers who were involved in M&A should pay attention to the knowledge management practice strategies that are used for knowledge transfer and

implement these strategies within their organizations if none exist. Based on the results of this study, I am recommending professional actions to achieve knowledge transfer within an organization during M&A that include: (a) implementing communication processes for daily knowledge sharing, (b) implementing practices to overcome knowledge transfer barriers, (c) incorporating training and development among all employees, (d) implementing new technology, and (e) implementing management support to transfer knowledge.

Managers must establish a culture in which networking and relationship building are evident throughout their organization so all employees can effectively communicate and transfer knowledge. By networking, employees could have more confidence in presenting their ideas and understanding the solutions needed to resolve any issues; this could lead to improved job performance. Managers and employees must always have an open, two way communication with each other to transfer knowledge and discuss any potential barriers. Managers must establish training and developmental sessions or workshops that employees can use to increase their knowledge and leverage learning from others. Employees should have the expertise and training to carry out the roles and responsibilities for their positions through the knowledge they gain from within (Nesheim & Gressgard, 2014). Managers must continually improve their efficiencies and processes of knowledge transfer to increase the competitive advantage of the organization. Through the effective use of different knowledge sources, employees could increase the competitive advantage of their organization (Kotabe & Kothari, 2016). Managers must provide organizational support to transfer knowledge to their employees and such support

will aid employees in effectively delivering key initiatives and this could lead to an alignment with the overall goals, missions, and objectives of the organization. The support management provides employees can positively impact the knowledge transfer process within the organization (Hussein, Singh, Farouk, & Sohal, 2016).

Implications

The implication from this study is that knowledge management asset resources can be used to retain employees during M&A. Organizations engage in M&As to enable organizational growth, challenge employees at all levels in the organization, provide opportunities for knowledge transfer and support social responsibility (Fairweather, 2012). The research conclusions yield implications for two organizational stakeholders, the employees and the managers. Employees, managers, and customers are part of the society, any change that affects them also affects the society (Whalen, 2014). Each manager is also an employee, and this becomes visible during M&A integrations, where many people struggle to adapt to a new environment that has yet to be defined. The findings could improve managerial practices for employees M&A integration and knowledge transfer. In my research findings, I identified important factors that affect knowledge transfer and the role management could play to facilitate knowledge transfer and to diminish negative impact of M&A. In this study, I found strategies that are essential to establish an effective organizational culture and improve performance in the organization, which are also necessary for the implication of social change. These strategies include effective knowledge transfer and employee-focused management. The findings of this study may also contribute to positive social change as employees become

a part of a newly merged organization and may strive for organizational and individual success. The result of this study may contribute to a positive social change because mid-level managers can understand the knowledge management asset resources that are needed to share knowledge within the organization. By using these knowledge management asset resources, mid-level managers could positively change knowledge transfer processes in their organization and reduce unemployment which leads to economic development.

The significant findings of this study confirmed that Communication, training and development, employee retention strategy, organizational culture, knowledge transfer, information technology, trust, management support may assist in employee retention during a M&A. In my findings, mid-level managers could create a culture that encourages knowledge transfer through training and development of employees. They could also create a culture that encourages knowledge transfer through the implementation of communication methods to encourage the transfer of tacit knowledge. Mid-level managers could create a culture that encourages knowledge transfer through employee's retention plan and a reward system. In an organization, mid-level managers could create a culture that encourages successful knowledge transfer by trust. Foos, Schum, and Rothenberg (2006) stated that the transfer of tacit knowledge relies heavily on trust. They authors measured the trust level in the following areas: mutual trust, information-sharing honesty, and identification as one team, shared project goals, and shared vision (Foos et al., 2006). The successful implementation of the knowledge

management assets practice strategies could lead to these positive social changes with mid-level managers, employees, and their organization.

The best practices in knowledge-transfer aim to improve the M&A integration process and ultimately improve the financial success rate of M&A in general. Managers play an important role and based on the specific needs and expectations of the organization, managers may select and combine any of the eight identified themes from my research study. In addition, managers may enhance their company performance by establishing effective organizational culture. Managers from similar industries may need to give attention to the results of this study because insufficient knowledge of effective organizational culture affects performance. Organization managers must establish training and developmental sessions or workshops that employees can use to increase their knowledge and leverage learning from others. Mid-level managers must continually improve their efficiencies and processes of knowledge transfer to increase the competitive advantage of their organization. Managers should pay attention to the knowledge management practice strategies that are used for knowledge transfer and implement these strategies within their organizations if none exist.

Conclusions

The purpose of this qualitative descriptive phenomenological study was to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-sized information technology firms in California from 2014-2019. The central question was: What are the lived experiences of mid-level managers in their use of management assets to retain

employees of recently merged medium sized information technology firms in California from 2014–2019? The answer is that there are multitude of knowledge management assets available to mid-level managers to assist in the retention of employees. My research revealed that managers themselves are a great resource, along with other organizational resources: communication, training and development, employee retention strategy, organizational culture, knowledge transfer, information technology, trust, management support. The findings from the study confirmed current literature indicating that tacit-knowledge transfers contributed to organizations competitive advantage and employee performance. I analyzed the findings and integrated concepts from the supported literature review in chapter two. In particular, the notion of tacit knowledge using Nonaka and Takeuchi's model was central. I applied a qualitative research method with phenomenological design and used eleven semi-structured interview questions with 12 mid-level managers. Eight themes were generated from the interview responses that related to the research question of the study: communication, training and development, employee retention strategy, organizational culture, knowledge transfer, information technology, trust, management support. The study participants contributed data that led to the identification of these eight themes as important resources to establish an effective organizational knowledge management asset and to retain employees during M&A.

Drawing on the evidence from the interviews, this study concludes that to ensure operational continuity requires the effective management of knowledge management assets of an organization. Since an organization's assets add value to the company, how that asset is managed becomes paramount to organizational success and must be

considered in organizational strategy and planning. Knowledge adds value when it is transferred because unlike other assets, when knowledge is transferred, it increases rather than diminishes. When knowledge is viewed as a strategic resource, knowledge transfer impacts the bottom line of an organization. Knowledge transfer is not always an automatic event or natural occurrence. A collaborative environment that encourages knowledge transfer becomes necessary if organizations are to realize the benefits. In conclusion, findings of this study can be helpful in setting parameters for more advanced research on knowledge transfer in the context of M&A. Given the prevalence of M&A activity in the global market, and its adoption by organizations intent on gaining technological knowledge and capabilities quickly, this will continue to be a promising area of research.

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Appendix A: Field Test Solicitation Email

Dear Professor,

My name is Joy Emole, and I am conducting a field test and would love for you to participate as I need your expertise in aligning the research method to the interview questions. Your input would allow me to make revisions as well as improve the quality of my current proposal. Attached is the problem statement, purpose statement, research question, and interview questions. I would appreciate if you could provide feedback by the end of next week to help me generate an adequate dissertation proposal.

Sincerely,

Joy Emole

Research Question	Conceptual Framework	Purpose Statement	Interview Questions	Literature Review Sections
<p>What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium sized information technology firms in California from 2014–2019?</p>	<p>The conceptual framework for this study is based on Nonaka and Takeuchi (1995) organizational knowledge creation and transfer. The framework offers four modes of knowledge conversion: socialization, externalization, internalization, and combination (Nonaka & Takeuchi, 1995).</p>	<p>The purpose of this qualitative descriptive phenomenological study is to understand the merger-related knowledge management assets used by mid-level managers in the retention of employees at recently merged medium-sized information technology firms in California from 2014-2019.</p>	<p>IQ1. What are the most common causes of merger and acquisition failure?</p> <p>IQ2 How did the employees react to the announcement of the merger?</p>	Mergers
			<p>IQ3: What is the general awareness of the role of knowledge management assets?</p>	Knowledge Assets
			<p>IQ4: What role did organizational culture play in the integration process of new employees?</p>	Organizational Culture
			<p>IQ5: What is your perception of how Information Technology affects knowledge management assets?</p>	Information Technology
			<p>Management Problem</p>	

The specific management problem is that mid-level managers may not have improved strategies to facilitate knowledge management assets during a merger

<p>IQ6: How do you retain management assets of an employee who is leaving the organization?</p> <p>IQ7: Do you know of other companies' approaches to capture and share knowledge management assets?</p> <p>IQ8: What techniques do you use to identify and capture tacit knowledge?</p>	Knowledge management
<p>IQ9 How do you retain tacit knowledge of an employee who is leaving the organization?</p>	Employees Involvement
<p>IQ10: What else would you like to share on approaches that can be tailored to merging firms to effectively capture and share tacit knowledge?</p>	Teamwork
<p>IQ11: What training was needed to perform the job well?</p>	Employee Empowerment

Appendix B: Recruitment Letter

Recruitment Letter to Participate in the Study (LinkedIn Invitation)

To: (Participant Name)

Subject: Possible Participant for Research Study

Dear Potential Research Participant,

My name is Joy Emole, I am a doctoral student at Walden University conducting a research study. I would like to invite you as a mid-level manager on LinkedIn to please participate in my dissertation research. The purpose of this study is to explore the lived experiences of mid-level managers utilizing knowledge management assets in the retention of employees at recently merged medium-sized information technology firms in California. I am seeking mid-level managers who fit the criteria to take part in an interview. You are being asked to participate because you are a mid-level manager who have been involved in a merger and acquisition in the state of California.

The main question of the study is what are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium sized information firms in California from 2014–2019? For further understanding of how mid-level managers utilize knowledge management assets, the following additional sub-research questions will support the main research question: (a) What knowledge management challenges do mid-level managers encounter while transitioning into a merger? (b) What are the knowledge management policies, approaches, and procedures that could be tailored for merger to support the capturing and retention of employees?

tacit knowledge? (c) How do mid-level managers cope with the challenges that they face while transitioning into a merger?

The participation in this research study will be solely voluntary. The study entails a one-on-one interview, lasting approximately 60 minutes. The reports of this study will not share the identities of individual participants. The participants' personal information will be confidential, and no names will be used in any reports or publications. If you would like to participate in this study and meet the above criteria, please email me and I will send you the informed consent form to review and sign, along with a copy of the interview questions to review in advance.

Thank you for your time.

Sincerely,

Joy Emole

Doctoral Student-Walden University

Appendix C: Interview Questions

Interview Questions

RQ: What are the lived experiences of mid-level managers in their use of management assets to retain employees of recently merged medium sized information technology firms in California from 2014–2019?

1. What are the most common causes of merger and acquisition failure?
2. How did the employees react to the announcement of the merger?
3. What is the general awareness of the role of knowledge management assets?
4. What role did organizational culture play in the integration process of new employees?
5. What training was needed to perform the job well?
 - How do you retain knowledge management assets of an employee who is leaving the organization?
 - Do you know of other companies' approaches to capture and share knowledge management assets?
 - What techniques do you use to identify and capture tacit knowledge?
 - How do you retain tacit knowledge of an employee who is leaving the organization?
 - What else would you like to share on approaches that can be tailored to merging firms to effectively capture and share tacit knowledge?

- What is your perception of how Information Technology affects knowledge management assets?

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