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Strategies for Retaining Talented Employees During Downsizing

Karen D. Smith
Walden University

Walden University

College of Management and Technology

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Karen D. Smith

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Dr. Jaime Klein, Committee Member, Doctor of Business Administration Faculty

Dr. Timothy Malone, University Reviewer, Doctor of Business Administration Faculty

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Sue Subocz, Ph.D.

Walden University
2020

Abstract

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Karen D. Smith

MBA, Strayer University, 2010

BS, University of Cincinnati, 1983

Doctoral Study Submitted in Partial Fulfillment

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Doctor of Business Administration

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Abstract

Nonexistent talent management strategies can negatively impact retention levels of talented employees during downsizing. Human resource managers who struggle to retain talented employees are at risk of not maintaining a competitive advantage and business sustainability. Grounded in the institutional theory of downsizing, the purpose of this qualitative multiple case study was to explore strategies human resource managers use to retain talented employees during downsizing. Participants included 6 human resource leaders from Fortune 500 service industry corporations in metropolitan Atlanta, Georgia, who used talent management retention strategies to retain talented employees during downsizing. Data were collected from semistructured face-to-face interviews and organizational artifacts. Thematic phase analysis consisted of compiling, disassembling, coding, and reassembling the data; interpreting the meaning; and developing themes and patterns. Three central themes emerged: transparent communication, performance standards, and succession planning. Key recommendations for leaders are to identify the talented employees using an equitable performance review process, use transparent communication throughout each phase of downsizing to minimize employee anxiety, and include in their strategy a process similar to one for succession planning. The implications for positive social change include the potential for business and human resources leaders to eliminate personal bias and promote workplace equality, thereby sustaining talented employees' labor market participation in their respective communities.

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Dedication

I dedicate this study to my mother, Rosalee M. Smith; posthumously to my father, Charles R. Smith, Sr.; my aunt and godmother, Dr. Catherine M. McCottry; and my godmother, Delois Ham Oliver. Thank you for your words of life principles, values, and unconditional love.

Acknowledgments

I graciously take this opportunity to thank my Heavenly Father for his love, grace, and guidance through this arduous journey. Without Him, I would not have endured the trial and tribulation of this program to achieve this momentous milestone in my life's journey. I acknowledge my extended family and close friends whose unwavering support encouraged me to persevere and complete this program. I knowledge my DBA committee. Dr. Beverly Muhammad, my chairperson, whose constant words of encouragement and reassurance during my journey, was priceless. Your guidance, mentorship, and commitment to my success eclipsed my expectations to the point where I had no option but to complete this study. For this, I am eternally grateful. I also extend my gratitude to Dr. Jamie Klein, my second committee member, for your steadfast review of my study, words of support, and professionalism demonstrated during my oral defense. To my university research reviewer, Dr. Timothy Malone, your scholarly feedback challenged the scholarship of my study and propelled me to improve the context of this study. Thank you for your scholarly review and thoughtful comments. Finally, I thank Dr. Davis, the program director, for your constant support of the students and staff, as well as your dedication to improvements of the DBA program.

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Section 1: Foundation of the Study

Human resource management (HRM) is the strategic business approach used to focus on the management of employees within an organization (Terziev, 2017). HRM includes the undertaking of talent management and corporate social responsibility (Armstrong & Taylor, 2014). Human resource managers struggle to maintain talented employment levels during volatile economic business cycles (Hoffmann & Lemieux, 2016). The lack of talent management strategies negatively influences the competitive edge and sustainability of businesses (Meyers & van Woerkom, 2014). Conceptualized as a strategic alternative, organizational restructuring is a reactive and tactical action in response to the lack of talent management schemes (Gandolfi, 2014). Downsizing and rightsizing are some of the organizational restructuring strategies practiced today (Ansari, 2016). Organizational restructuring can be costly (Muñoz-Bullón & Sánchez-Bueno, 2014) and can affect the work environment and the talented employees of an organization. For a business to survive negative business cycles and maintain a competitive advantage, business and talent managers are motivated to downsize human capital (Cappelli & Keller, 2014). When managers downsize without strategies, organizational sustainability is negatively impacted (Gandolfi & Hansson, 2015). The loss of human capital can result in efficiency loss that may affect the competitiveness and profitability of an organization (Kraemer, Gouthier, & Heidenreich, 2016).

Business and talent managers should perform corporate social responsibility when downsizing. The absence of corporate social responsibility during downsizing adversely impacts society and the environment (Ahlstrand & Rydell, 2017). Exploring strategies some human resource managers use to retain talent may yield useful information for managing talented employees.

Background of the Problem

Business managers deploy human resource and talent management strategies to identify, develop, employ, and retain a pool of talented and performing employees (Gupta & Haque, 2015). Strategic HRM is an approach used to develop and implement human resource strategies to integrate and align with business strategies (Brewster, 2017). Both strategic HRM and talent management strategies can contribute to the performance of an organization when business and human resource objectives align (M. Johnson, 2015). The misalignment of talented employees and business strategies can negatively influence talent sourcing and financial performance trends, resulting in downsizing (Oppong, 2017). Troubled organizations have used downsizing as a business strategy to eliminate human capital for such reasons as mismanagement, bankruptcy, powerful competition, mergers and acquisitions, the advent of the internet, and globalization (Agwu, Carter, & Murray, 2014).

For organizations to survive in a changing business environment, their business and talent managers search for effective and successful talent management strategies (Latukha, 2015). A thorough review of business management units within an organization may lead to new priorities for retaining talented employees (Bravo & Egaña, 2017). Some business and talent managers search for strategies to responsibly eliminate talented employees (Du Plessis, 2014). In a competitive business environment, managers must have effective strategies for eliminating talented employees during downsizing

(Fernandez & Worasuwan, 2017). Despite the growing popularity of talent management, contemporary research focusing on talent retention during downsizing is limited (Al Ariss, Cascio, & Paauwe, 2014). The purpose of the current case study was to explore strategies some human resource managers use to retain talented employees during downsizing.

Problem Statement

Talent retention can be problematic in times of volatile downsizing (Lai, Saridakis, Blackburn, & Johnstone, 2016). The U.S. Bureau of Labor Statistics (2017) reported 2 million layoffs and discharges of employees attributed to the 60.1 million total job separations in 2016. The general business problem was that human resource managers do not successfully retain talented employees during downsizing (Al Ariss et al., 2014). The specific business problem was that some human resource managers lack strategies to retain talented employees during downsizing.

Purpose Statement

The purpose of this qualitative multiple case study was to explore strategies some human resource managers use to retain talented employees during downsizing. The sample population consisted of two human resource managers from three different service industry corporations located in metropolitan Atlanta, Georgia, for a total of six participants whose strategies help them retain their talented employees during downsizing. Human resource managers may use the findings of this case study to create useful strategies for retaining talented employees during downsizing. The implications for positive social change include the potential for business and human resources leaders to eliminate personal bias and promote workplace equality, thereby sustaining labor market participation of these individuals in their respective communities.

P. Tsai and Yen (2015) posited an effective downsizing strategy for retaining talented employees could positively influence workforce reduction by minimizing the number of families impacted and social chaos caused by downsizing. The findings of the current case study may be used to contribute to positive social change by supporting displaced employees with resources like outplacement, resumes, cover letters, interview coaching, counseling for displaced employees and their families, and recommendations for other positions to mitigate the detrimental effect of unemployment on family life, thereby sustaining the economic wealth and labor market participation of individuals in their respective communities.

Nature of the Study

Qualitative, quantitative, and mixed methods are three types of research methods (Yin, 2017). For the current study, I selected the qualitative method. Researchers employ the qualitative method to explore, understand, interpret, or explain phenomena in real-world contexts (Gill, 2014). When conducting qualitative research, researchers use open-ended questions to explore the *what*, *how*, or *why* of a phenomenon (McCusker & Gunaydin, 2015) where limited or no understanding exists (J. S. Johnson, 2014). The qualitative method with open-ended questions that was used in the current study was suitable for exploring strategies some human resource managers use to retain talent during downsizing.

In contrast, researchers use the quantitative method to quantify the research problem by measuring variables to collect numerical data for statistical analysis (Maxwell, 2016). Quantitative researchers also use closed-ended questions to test hypotheses (McCusker & Gunaydin, 2015) or to examine the relationship or differences between dependent and independent variables (Molina-Azorín & López-Gamero, 2016), which was not the intent of the current study. The mixed methods approach combines quantitative (statistical trends) and qualitative (social experience) in the same study (Birchall, Murphy, & Milne, 2016). The mixed methods approach was not appropriate for the current study because it did not require testing of hypotheses or analysis of statistical trends of downsizing.

The five qualitative research designs considered for the current research included phenomenological, ethnography, narrative, grounded theory, and case study. The phenomenological design is suitable for exploring individual worldviews or lived experiences related to the phenomenon (Cibangu & Hepworth, 2016). The phenomenological design was not suitable for the current study because the intent was not to explore real-life experiences. Ethnography is appropriate for describing the behavioral patterns, conditions, and beliefs of cultural groups through participant observation in a natural setting for a prolonged period (Gill, 2014). The ethnographic design was not appropriate for the current because I was not exploring the culture of a group. The narrative design is useful when collecting and analyzing stories, field notes, interviews, letters, and photos over an extended period to recount the life experience of individuals (Dailey & Browning, 2014). The narrative design was not appropriate for the current study because I was not recounting the life experience of individuals. Grounded theory is suitable when theories are needed to explain a phenomenon (Charmaz, 2014). The grounded theory design was not suitable because using theories to explain a phenomenon was not the intent of the current study.

I chose a multiple case study design. A case study design is beneficial when exploring the details and complexities of a phenomenon for a better understanding (Yin, 2017). Researchers use multiple case studies to explore various occurrences of a phenomenon to gain an understanding of differences and similarities among multiple cases (Marshall & Rossman, 2016). A multiple case study design was suitable because I explored strategies some human resource managers use to retain talent during downsizing.

Research Question

What strategies do some human resource managers use to retain talented employees during downsizing?

Interview Questions

1. How does your organization define talented employees?
2. How does your organization identify which talented employees will be displaced due to downsizing?
3. How does your organization support the needs of talented employees who will be displaced?
4. What strategies did the management of your organization use to reduce the dependence of social pressures as determinants to downsize?

5. What strategies did the management of your organization use to clarify performance standards as determinants to downsize?
6. What strategies did the management of your organization use to moderate the uncertainty of technologies as determinants to downsize?
7. How did you address the internal and external barriers to implementing effective strategies to retain your talent during downsizing?
8. What strategies have you found to be most useful in retaining your talented employees during downsizing?
9. What additional information can you share about the appropriateness of a strategy to retain talented employees during downsizing?

Conceptual Framework

Meyer and Rowan (1977) developed the neo-institutional theory and suggested that a formal structure emerges in organizations as these organizations conform to institutional rules and norms from their social environment to gain legitimacy. McKinley, Sanchez, and Schick (1995) augmented the neo-institutional theory to explain the impetus for downsizing, creating the institutional theory of downsizing. The social forces underlying the impetus for downsizing are constraining, cloning, and learning (McKinley et al., 1995). McKinley et al. argued that these social forces are critical drivers of downsizing but do not operate collectively in all conditions.

McKinley et al. (1995) identified four factors that strengthen the influence of these social forces for downsizing: dependence, ambiguous performance standards, uncertain core technologies, and frequent corporate interaction patterns. The institutional theory of downsizing embodies these factors for downsizing in a manner that encourages managers to evaluate the appropriateness of a downsizing strategy (McKinley et al., 1995). The institutional theory of downsizing was appropriate for the current study because I used the social factors of the theory as the focus of the interview questions. I explored strategies that some human resource managers use to retain talented employees during downsizing to answer the research question.

Operational Definitions

Age of maturity: Age of maturity is the earliest age (66) at which an individual can receive full Social Security retirement benefits (Social Security Administration, 2018).

Employment downsizing: Employment downsizing is a proactive management strategy to eliminate human assets (Cascio, 2015).

Human capital: Human capital is a person whose skills, knowledge, or other intangible assets are used to create economic value for persons, their employers, or their communities (Plank-Bazinet, Heggeness, Lund, & Clayton, 2016).

Legitimacy: Legitimacy is an organizational function to incorporate guidelines of norms, values, and beliefs desirable and suitable in a society (Carvalho, da Cunha, Lima, & Carstens, 2017).

Organizational restructuring: Organizational restructuring is a plan to change the formal patterns of the operations to improve corporate efficiency (M. C. Tsai & Qian, 2015).

Rightsizing: Rightsizing is a management strategy to align human assets with business strategies (Tripathi, 2014).

Talent management: Talent management is an integrated strategy designed to increase productivity and attract, develop, and retain individuals to meet current and future business needs (Sharma, Sharma, & Tiwari, 2015).

Talent retention: Talent retention is an organizational practice to meet diverse desires and create a workplace environment that encourages individuals to remain employed (Osman, Noordin, Mohd, & Loon, 2017).

Talented employees: Talented employees are individuals with above-average skills and competencies whose values correspond to the organizational culture (Boštjančič & Slana, 2018).

Assumptions, Limitations, and Delimitations

Assumptions

An assumption is a belief or idea presumed to be correct, often with little or no evidence (Paul & Elder, 2014). The first assumption of the current study was that selected participants had retained talent during downsizing. The second assumption was that the participants' responses to the interview questions were truthful. The third assumption was that a purposeful sampling technique would be an effective method for choosing participants (see Etikan, Musa, & Alkassim, 2016). The final assumption was that participants would provide data that would allow me to identify common themes regarding human resource strategies and the effectiveness of these strategies during downsizing.

Limitations

Limitations are potential weaknesses of a case study that may influence the results adversely (Bouzon, Cauchick-Miguel, & Rodriguez, 2014). Limitations address the internal and external validity of the study (Palinkas et al., 2015). The first limitation of the current study was that the threshold of staff employees as interviewees might narrow the depth and richness of the data. The second limitation was the short time to conduct the study. The third limitation was that the data for this study reflected the views and experiences of the sample population only.

Delimitations

Delimitations are boundaries enacted to define and limit the scope of a study (Marshall & Rossman, 2016). The first delimitation was that the current study was restricted to human resource managers located in a metropolitan city in the Southeast United States. The second delimitation was that the sample population included six human resource managers. The third delimitation was that the sample population did not include human resource managers from the agricultural and manufacturing sectors. The fourth delimitation was that the purposive sampling used to recruit participants did not include every geographical region and trade industry.

Significance of the Study

Contribution to Business Practice

The findings from this qualitative multiple case study could have significance for companies looking for strategies to retain talented employees while implementing downsizing. The results could be used to reduce the gap in the literature and present valuable findings for human resource managers to retain talented employees during downsizing. The findings could increase awareness of how organizational restructuring affects the competitiveness and profitability of the organization when talented employees are furlough (see Kraemer et al., 2016). Knowledge of effective downsizing strategies that human resource managers practice could provide current and future business and human resources managers with tools to retain talented employees during downsizing. The findings could also include strategies for human resource managers to use to retain talented employees with industry-specific skills during downsizing. Additionally, the results could benefit organizational strategists, business leaders, human resource and talent management professionals, and stakeholders as they engage in the formation of employee retention strategies during downsizing.

Implications for Social Change

According to the U.S. Bureau of Labor Statistics (2017), employee separations are on the rise, and talent is scarce. Understanding strategies some human resource managers are using to retain employees with industry-specific skills during downsizing is pivotal for business and human resource managers focusing on effective downsizing strategies. From a social change perspective, the current case study may be valuable to business and human resource managers looking to eliminate personal bias and promote workplace equality, thereby sustaining labor market participation of these individuals in their respective communities.

A Review of the Professional and Academic Literature

This review of the professional and academic literature contains an opening narrative and application to the applied business problem. The opening narrative includes a brief discussion of the sources retrieved for the study. I explain the organization of the review, the strategy for searching the literature, and the sources retrieved. I found 60 peer-reviewed articles to support the study, and 85% of the sources had publication dates within 5 years from my anticipated graduation date.

The purpose of the literature review was to present a critical analysis and synthesis of historical and contemporary works concerning strategies human resource leaders use to retain talented employees during downsizing. In conducting the literature review, I used industry-based business books and peer-reviewed scholarly journal articles from databases at the Walden University library, Strayer University library, and Atlanta Technical College online library. Databases included EBSCOhost, ProQuest, ABI/INFORM complete, Lexis-Nexis, GALILEO, Taylor and Francis, SAGE Premier, Emerald, Science Direct, Thoreau, Google Scholar, and Government.

Researchers conduct a review of the literature to (a) identify relevant research; (b) assess existing knowledge; (c) challenge existing approaches, theories, and findings; and (d) advance subject matter scholarship (Onwuegbuzie & Frels, 2014). The literature review includes criticism of scholarly works from various scholars that allow a researcher to gain a better understanding of the research phenomenon, identify gaps in the literature, and create questions to guide future research relating to the subject matter (Grewal, Kataria, & Dhawan, 2016). A critical analysis and synthesis of the literary works allow researchers to compare underlying research to shape current study results (Lang & Bayat, 2015). The rationale for a literary review enables a researcher to explore previous literature for best practices, identify the paradigms of the research theme, synthesize and contrast viewpoints, and gain valuable information about the research problem (Grewal et al., 2016). To obtain a better understanding and gain valuable information about retaining talented employees during downsizing, I organized and conducted a critical analysis and synthesis of literature related to downsizing strategy, the role of human resource managers, employee retention strategies, strategic HRM, and talent management.

A systematic and well-organized approach for searching the literature provides a researcher with an opportunity to gain insight into a phenomenon and how previous scholars studied the phenomenon (Grewal et al., 2016). The literature search strategy used for the current qualitative case study began with an inquiry of scholarly peer-reviewed articles and seminal books using electronic databases. The literature review included 223 scholarly peer-reviewed articles, 16 seminal books, and one conference proceeding published between 2014 and 2019. Additional sources included 32 scholarly peer-reviewed articles and three seminal books published before 2014. Search terms used in the collection of the literature were *downsizing*, *employment downsizing*, *rightsizing*, *labor market*, *downsizing strategies*, *talent management*, *employee retention*, *human resource management*, and *strategic human resource management.*

The literature review for this study contains information for scholars whose findings were similar and dissimilar regarding the employment downsizing phenomenon. The literature review includes factors about talented employee retention and the effect of those factors on organizational sustainability during downsizing. The critical analysis and synthesis of the literature contain a scholarly depiction of the magnitude of the problem concerning retaining talented employees during downsizing.

Application to the Applied Business Problem

The objective of this qualitative case study was to explore strategies that some human resource managers use to retain talented employees during downsizing. The sample population consisted of two human resource leaders from three different retailers located in metropolitan Atlanta, Georgia, for a total of six participants whose strategies help them retain their talented employees during downsizing. Human resource managers may use the findings of this study to create useful strategies for retaining talented employees during downsizing. The implications for positive social change include the potential for business and human resources leaders to eliminate personal bias and promote workplace equality, thereby sustaining labor market participation of these individuals in their respective communities.

P. Tsai and Yen (2015) posited that an effective downsizing strategy for retaining talented employees could positively influence workforce reduction by minimizing the number of families impacted and social chaos caused by downsizing. The findings of the current study may be used to contribute to positive social change by supporting displaced employees with resources like outplacement, resumes, cover letters, interview coaching, counseling for displaced employees and their families, and recommendations for other positions to mitigate the damaging effects of unemployment on family life, thereby sustaining the economic wealth and labor market participation of individuals in their respective communities.

Critical Analysis of the Institutional Theory of Downsizing

McKinley et al. (1995) augmented the work of Meyer and Rowan (1977) to develop an institutional theory to explain the impetus for downsizing. The institutional theory of downsizing is used by researchers to address the factors attributed to downsizing (C. F. Tsai, Wu, Wang, & Huang, 2006). From an institutional perspective, the institutional theory of downsizing emerged as one of the leading approaches for studying organizational downsizing over the past few decades (P. Tsai & Yen, 2015). Many scholars (Agwu et al., 2014; Alexiev, Volberda, & Van den Bosch, 2016; Gandolfi, 2014; Muñoz-Bullón & Sánchez-Bueno, 2014) have approached organizational downsizing using the lens of this theory to gain legitimacy for downsizing.

McKinley et al. (1995) identified the social forces of constraining, cloning, and learning to be the primary impetus for downsizing, but they are not operative communally in all conditions. McKinley et al. noted that dependence, ambiguous performance standards, uncertain core technologies, and frequent corporate interaction patterns are the conditions in which social forces augment institutional downsizing. Researchers (Chhinzer & Currie, 2014; Ellinas, Allan, & Johansson, 2017; Pollach, 2015; P. C. F. Tsai, Yeh, & Wu, 2016) have used the social factors as underpinnings of their research to bridge gaps in the literature.

Constraining, Cloning, and Learning

McKinley et al. (1995) identified three social forces as the impetus for downsizing: constraining, cloning, and learning. Constraining is the social force that coerces managers of an organization to conform to institutional rules to define legitimate structures and management activities (Gandolfi, 2014). Constraining forces managers to legitimize their managerial actions (Agwu et al., 2014). As managers aim to conform with social constraints to encourage leanness (Gandolfi, 2014), they are expected to eliminate employees and view downsizing as a suitable business practice for demonstrating legitimacy (Agwu et al., 2014). In contrast, cloning is the result of mimicking managers of organizations that represent a benchmark of prestige regarding excellence in their industry (Muñoz-Bullón & Sánchez-Bueno, 2014). The behavior of cloning is also the result of spurring by managers in an environment of extreme uncertainty (Alexiev et al., 2016). Managers are expected to endorse and espouse downsizing whenever other managers in their respective business industry promote and implement the practice of cloning irrespective of hard evidence of the benefits of downsizing (Muñoz-Bullón & Sánchez-Bueno, 2014). Finally, learning refers to teaching standard management practices through educational institutions and professional business associations that exacerbate the activity of downsizing (Agwu et al., 2014).

The teaching of different theories and alternative downsizing approaches to managers promotes the effectiveness of downsizing as a legitimate business management activity (Gandolfi, 2014). McKinley et al. (1995) argued the three social forces (constraining, cloning, and learning) are related but distinct sources of downsizing that do not operate conjointly in all situations. Managers use these social forces to promote downsizing as a favorable institutional norm for managers of organizations to mimic each another by reinforcing the role of downsizing as legitimate and acceptable through learning (McKinley et al., 1995). For managers to evaluate the appropriateness for a downsizing strategy, McKinley et al. identified four factors (i.e., dependence, ambiguous performance standards, uncertain core technologies, and frequent corporate interaction patterns) that complement the social forces and pressures (i.e., constraining, cloning, and learning) for institutional downsizing.

Dependence

Dependence on institutional investors causes managers of organizations to be susceptible to constraining forces and to conform to the institutional rules of the investors (Jung, 2016). Managers who practice conformity lessen the probability of institutional investors viewing management as a desirable party (McKinley et al., 1995). Since the 1980s, Fortune 100 and 500 managers have been relying on institutional investors for capital flow (Bonizzi, 2016). Jung (2016) conducted a study using a sample population of 714 publicly held U.S. companies to investigate the pressures for institutional investors and the frequent downsizing. Jung found a strong link between the increase in institutional investors' share value and the prevalence of downsizing.

Similarly, P. C. F. Tsai et al. (2016) explored downsizing as a lean production method and a means to achieve the satisfaction of institutional investors using 152 Taiwan managers from 18 industries, including manufacturing, banking, insurance, transportation, storage, logistics, and construction. P. C. F. Tsai et al. discovered that institutional investors’ satisfaction increases the probability of a long-term financial result that mitigates the negative impacts of downsizing.

Siddiqa (2017) argued that managers of organizations are not always financially pressured by institutional investors to downsize but to enhance the organization’s productivity. Managers make the decision to use the activity of downsizing to reduce the number of employees and increase the organization’s productivity, profitability, efficiency, and competitiveness (Al-Hammali, Habtoor, & Muthaliff, 2017). Managers conduct downsizing to influence institutional investors, and downsizing as an organizational activity becomes a legitimate and not an adverse action.

Ambiguous Performance Standards

A performance standard is a measurable statement of the action required by a system or person or procedure to satisfy a purpose or requirement (International Organization for Standardization, 2017). Managers use an organizational objective to establish the standards of performance against organizational activities. These performance standards should be quantitative, time-bound, realistic, and job-related so that the standard encapsulates the critical performance dimensions of the job (Armstrong & Taylor, 2014). Financial performance is one of the performance standards managers use to rationalize the decision to downsize (McKinley et al., 1995). Chhinzer and Currie (2014) used a mixed methods approach to investigate financial performance as a means for downsizing. Chhinzer and Currie discovered that organizations experiencing financial growth and decline engage in downsizing, and their financial performance postdownsizing will vary based on the initial downsizing rationale.

McKinley et al. (1995) posited that many organizational units lack clear performance standards, thereby causing organizational managers to exhibit little consensus concerning performance and organizational goals. When organizational managers display ambiguous behavior and a lack of accord, performance measurements are uncertain (McKinley et al., 1995). Performance measurements are capacities used to improve organizational performance by creating performance standards that are aligned with organizational goals (Armstrong & Taylor, 2014). Because of ambiguous performance standards, organizational managers are more likely to conform to institutional norms and imitate competitors' downsizing actions (McKinley et al., 1995). Organizational managers may use ambiguous performance standards to constrain and clone the legitimacy of downsizing.

Uncertain Core Technologies

Core technologies consist of technical knowledge unique to a business organization that provide a business with a superior and competitive edge relevant to the marketplace over other businesses (Phillips, 2001). Phillips (2001) argued that the cost and availability of people to sustain the core technology should compare favorably against the ease of downsizing. When managers are uncertain of the core technologies, the relationship between inputs and output is unclear, thereby causing technology uncertainty (McKinley et al., 1995).

Technology uncertainty is a type of uncertainty arising from external sources such as natural events, regulatory changes, or industry-level technological changes in resources and capabilities (Fixson, Khachatryan, & Lee, 2017). One fundamental challenge for managers is when industries emerge, they are not able to quantify the means and ends because of high levels of technological uncertainty. Because of this uncertainty, managers' decision to downsize tends to mimic other managers (McKinley et al., 1995). Datta and Basuil (2015) studied 20 U.S.-based organizations to determine the implications of employee downsizing. Datta and Basuil discovered that during an economic downturn and technology uncertainty, organizations aggressively use new technology to substitute employees; consequently, redundancy and reemploying downsized employees become less likely.

Throughout the late 20th century, the concept of downsizing was restricted to blue-collar employees in the manufacturing sector (Martin & Davis, 2013). The rise of technology uncertainty caused white-collar and pink-collar employees to begin encountering downsizing in their respective industries (Siddiqa, 2017). By the beginning of the 21st century, the concept of technology uncertainty contributed to the downsizing of gold-collar employees (i.e., attorneys, physicians, scientists, teachers, and investment bankers; Martin & Davis., 2013). Because of technology uncertainty, managers are most likely to downsize as a legitimate practice if it complements the existing, legitimate institutional environment.

Frequency of Corporate Interaction

Managers exchange common experiences with other managers through frequent interactions (Ellinas et al., 2017). Frequent interactions are a dialogue between managers from different industries that may cause them to react to social interaction by adopting and amending the institutional rules of other organizations (McKinley et al., 1995).

McKinley et al. (1995) noted that frequent interaction among managers encourages managers to create and imitate institutional rules to conform to common standards. Pollach (2015) conducted a qualitative study to investigate the perceptions, beliefs, and reasoning of 16 Danish directors regarding conforming, cloning, and legitimacy. Pollach found that by conforming to institutional rules through frequent interaction, managers mimic other successful organizations to gain or maintain their legitimacy. Similarly, Ellinas et al. (2017) explored the influence of social interaction on an organizational culture using 49 individuals from a UK-based insurance company. Ellinas et al. discovered that social interaction among individuals could influence other individuals to confirm and incorporate the standard norms of other organizations.

C. F. Tsai and Yen (2008) argued that learning is another source for which frequent interaction can influence downsizing. Managers gather at corporate training meetings, industry-specific conferences, and educational institutions to exchange ideas with other managers. These assemblies are forums in which discussions of downsizing approaches and strategies occur (Yeboah, 2015), while higher education through MBA courses presents managerial practice and principles for downsizing (McKinley et al., 1995). C. F. Tsai et al. (2006) explored the decision of 18 Taiwan multinational corporations to downsize and discovered that shared norms and learning from other organizations contributed to the downsizing decision. Similarly, Gandolfi (2014) examined the work of Budros (2004) to expound on the factors linked to the downsizing and the decision to downsize. Gandolfi found that business and social interaction between business leaders who define downsizing as normatively appropriate may lead other business leaders to engage in organizational downsizing.

McKinley et al. (1995) posited that frequent interaction is a fertile breeding ground for the spread of corporate downsizing through learning. The greater the number of direct contacts with managers who have downsized or are engaging in downsizing, the greater the likelihood other managers will adopt their best-practice activities (Gandolfi, 2014). Because of frequent interactions among managers, managers are inclined to adopt the approaches and strategies learned to conform and mimic (clone) institutional rules and downsizing decisions of benchmark organizations.

Critical Analysis of Supporting and Contrasting Theories

Social Cognitive Theory

The institutional theory of downsizing and social cognitive theory mirror similarities regarding learning in a social setting. Both theories are used to highlight the continuous interaction of the individuals, behavior, and the environment is critical factors in acquiring, maintaining, and changing behavior. Scholars Edwin C. Holt and Harold Chapman were the first to discuss social cognitive theory in 1931 (Apuke, 2017). Neal Miller and John Dollard (1941, as cited in Rais, 2015) expanded the social cognitive theory to understand how the social motivation of imitativeness is a behavior learned through observation. Based on Miller and Dollard's theory, Albert Bandura (1977, as cited in Lansford, 2016) extended his social learning theory to identify key constructs of his theory as (a) reciprocal determinism, (b) behavioral capability, (c) observational learning, (d) reinforcement, (e) expectations, and (f) self-efficacy. In 1986, Bandura (as cited in Connolly, 2017) expounded and renamed his original 1977 work of social learning theory to social cognitive theory. Bandura renamed his social learning theory to emphasize the role cognition plays performing behaviors. Bandura modernized the social cognitive theory to emphasize how knowledge acquisition occurs in a social context because of the reciprocal interaction of a person, behavior, and the environment (Nabi, 2015). Bandura (2014) posited that personal, behavioral, and environmental influences cause human behavior. Researchers have used Bandura's social cognitive theory to theorize that changes in the environment can automatically lead to changes in the person as a result of the interplay of personal, behavioral, and environmental influences (Devi, Khandelwal, & Das, 2017).

Researchers have used the institutional theory of downsizing and social cognitive theory to describe the behavior of humans as a continuous reciprocal interaction between cognitive, behavioral, and environmental influences (P. Tsai & Yen, 2015). Both theories have been used to justify managers' use of constraining (conforming), mimicking (cloning), and learning to influence their environment (Bandura, 2014). Hence, managers may use these theories to legitimize their managerial actions during downsizing.

Transaction Cost Theory

In contrast, the transaction cost theory is opposite the institutional theory of downsizing. Transaction cost theory involves transaction cost economics as a behavior for exchanging services or tasks within or outside the organization between economic actors (Raffo, Clark, & Arik, 2016). John R. Commons introduced the transaction cost theory in 1934 (Kitagawa, 2016). In 1937, Ronald Coase expanded and developed the theoretical framework of theory to include forecasting economic tasks (Hajli, Shanmugam, Hajli, Khani, & Wang, 2015).

Oliver Williamson (1981, as cited in Kyläheiko, 2015) extended and expounded Ronald Coase's research to include dimensions of frequency, specificity, uncertainty, limited rationality, and opportunistic behavior. Williamson posited that the transaction cost approach involves the comparative costs of planning, adapting, and monitoring a task to completion. The behavior of measurability tasks related to transactions (Cefis & Triguero, 2016) is dissimilar to the observation of the behaviors of constraining (conforming), mimicking (cloning), and learning (Bandura, 2014). Therefore, economic tasks related to economic transactions may not legitimize a downsizing activity.

Literature Themes

Employment Downsizing

Employment downsizing is corporate reconstruction or restructuring used to streamline, tighten, and shrink the number of human assets (Cascio, 2014). As the term of *workforce downsizing* enlarged, employment downsizing was expanded to cover the broader range of managerial undertakings to improve solid performance (Agwu et al., 2014). Today, leaders define *employment downsizing* as activities designed to improve organizational efficiency, productivity, competitiveness, or business performance results (Agwu & Carter, 2014).

Over the past three decades, downsizing has played a dominant role in organizational life (Bidwell, Briscoe, Fernandez-Mateo, & Sterling, 2013). The activity of employment downsizing emerged in the 1960s and early 1970s to targeted unskilled employees (Kajapriya & Surya, 2015). By the 1980s, employment downsizing became a standard business practice for organizations to make cost reduction for a short time frame (Rodríguez-Ruiz, 2015) and prominence as a subject matter of both scholar and practical concerns (Kajapriya & Surya, 2015). During this time, employment downsizing not only affected unskilled employees but highly talented professionals and all levels of management. By the 1990s, the practice of workforce downsizing was customary, and this period was coined the *downsizing decade* (Agwu & Carter, 2014). Presently, employment downsizing has become a part of an extended workforce plan designed to align with the organization's business objective to produce a positive outcome.

As a strategic managerial tool, employment downsizing has become a tactic for reducing resources and adjusting the organizational structure to sustain a competitive edge (Gross, 2015; Saif et al., 2013). In the narrowest sense, leaders use employment downsizing during an economic downturn as a reactive or proactive action (Luan, Tien, & Chi, 2013). Gandolfi (2014) examined a 1994 literary work of Drew to explore the driving force of employment downsizing. Gandolfi discovered that downsizing employees is a combination of company-specific, industry-specific, and macroeconomic factors. Muñoz-Bullón and Sánchez-Bueno (2014) used a quantitative approach to investigate the institutional determinants of downsizing. Muñoz-Bullón and Sánchez-Bueno ascertained that business leaders frequently view and justify the event of employee elimination as an opportunity to enhance the organization's agility, using the factors globalization, technology, organization structure, and an unstable financial environment.

Although factors such as globalization, technology, and organizational structure restructure an organization, business leaders use the economic environment as their primary means to downsize talented employees (P. C. F. Tsai & Shih, 2013). Despite the vast amount of literature, some scholars have expressed uncertainty as to whether employment downsizing is useful in generating positive financial benefits (Cascio, 2014; Dai & De Meuse, 2013; Datta & Basuil, 2015; Gandolfi, 2014). Other scholars have posited that business leaders, such as Samuel S. Wurtzel of Circuit City, Mervin Morris of Mervyn's, and Bennett LeBow of Borders, who opted to downsize talented employees failed to yield economic benefits (Brauer & Laamanen, 2014; Campbell, 2014; Goesaert, Heinz, & Vanormelingen, 2015; Luan et al., 2013). Before deciding to downsize human capital, Vuontisjärvi (2013) advised that business leaders need to be mindful of the short-term and long-term financial effect of employment downsizing because downsizing during an economic downturn may reflect no change or an adverse effect on an organization's financial performance.

Senior managers (i.e., CEOs, COOs, and CFOs) need to explore and consider alternative methods that may improve and strengthen an organization's performance amid an economic crisis (Bragger, Kutcher, Menier, Sessa, & Sunmer, 2014). Norman, Butler, and Ranft (2013) believed there is a variety of employment downsizing alternatives and practices (i.e., job sharing, early retirement, shorter workweeks, and employee furloughs) when seeking a successful downsizing event. According to Dabic, Gonzále-Loureiro, and Furrer (2014), employment downsizing activity can be implemented and achieved using a suitable configuration—vertical and horizontal fit to sustain a competitive edge in a spirited environment.

Employee Rightsizing

Rightsizing is an organizational restructuring strategy for eliminating human capital (Ansari, 2016). Senior managers developed the term *rightsizing* to alleviate some of the anxiety caused by the term downsizing (Tripathi, 2014). Rightsizing describes a proactive strategic plan for managing talent (Rehin & Sreedharan, 2017). Senior managers use rightsizing as a continuous process to align and restructure human capital to align with business strategies (Yu, Chern, & Hsiao, 2013). When senior managers shift their strategic focus to be more agile and customer-driven or optimize production efficiency for long-term consequences, human resource managers may consider rightsizing (Rehin & Sreedharan, 2017). Senior and human resource managers use rightsizing as a restructuring strategy to eliminate positions and strategically position with the organization's right level of talent (Yu et al., 2013).

Distinction Between Downsizing and Rightsizing

Downsizing refers to the elimination of human capital to maneuver labor costs because of the excess number of employees (Cascio, 2014). Managers use the process of downsizing to react to financial losses, not profits, and organizational instability (P. C. F. Tsai & Shih, 2013). Downsizing is opted by most managers to reduce human capital and, hence, to cut salaries and expenses to optimize the performance of the remaining talent (Tripathi, 2014).

On the other hand, manager use rightsizing to reorganize and restructure human capital. It is a proactive process used by managers to increase the growth of an organization strategically. When correctly applied, rightsizing occurs when talent management strategies align with business strategies (Yu et al., 2013).

Cause and Effect of Employment Downsizing

Recession is a familiar phenomenon to the U.S. economy (Piketty & Saez, 2013). Various researchers have viewed the economic downturn of 2007-2008 termed the *Great Recession* as one of the greatest and severe economic and unemployment climates since World War II (Ball, 2014; Kajapriya & Surya, 2015; Piketty & Saez, 2013; Pissarides, 2013). During this recession, corporate downsizing and displacement of employees occurred, affecting the economic wealth and labor market participation of individuals in their respective communities (Trahms, Ndofor, & Sirmon, 2013). Pissarides (2013) explored how this recession affected the U.S. labor market and the employment of human capital. Pissarides discovered amid the economic downturn of 2007-2008, the U.S recovery was sluggish because of the lack of employment creation and the decline of labor mobility. Similarly, Ball (2014) and Kajapriya and Surya (2015) believed this recession exhibited a classic study of patterns in the labor market, revealing that the levels of employment, professional, and talented human capital were more volatile to this negative business cycle and weakened economy than previous economic downturns.

Although employment downsizing has declined in certain segments, Freeman (2013) and Cascio (2014) believed human capital continues to encounter serious employment issues in this type of labor market. Freeman explored how the U.S. labor market failed to create jobs during the 2007-2008 recession and recovery. Freeman discovered the economic and job market indicators of education, experience, occupation, and industry groups appeared to be stable regarding the employment of talented human capital. Conversely, Cascio ascertained that there is a sizeable gap in the labor market of unemployed professionals and talented human capital, creating a disenfranchising environment. Vuontisjärvi (2013) opined senior managers often instruct human resource managers to paralyze the employment of individuals to maximize profit.

Features of the Great Recession of 2007-2009 also exposed dimensions of problems and their implications on the labor market and unemployment never encountered during the last five recessions (Freeman, 2013). Business analysts and scholars Pfeffer, Danziger, and Schoeni (2013) and Farooq and Kugler (2015) analyzed prior recessions, the population of the labor market, and the unemployment rate of demographic groups to evaluate the impact of the Great Recession. Pfeffer et al. conducted their quantitative study using the Panel Study of Income Dynamics and Survey of Consumer Finances to record changes in the labor market and employment of talented human capital. Pfeffer et al. discovered that socioeconomic groups (i.e., professional, talented, and semi talented human capital) experienced similar shifts in the labor market and unemployment of talented human capital nationwide.

Farooq and Kugler (2015) utilized the Beveridge curve to explore the relationship between employment creation and the unemployment rates of talented human capital. Farooq and Kugler uncovered that the sharp rise in the unemployment rate was generated by cyclical and not structural factors of the economic calamity and labor markets. Farooq and Kugler's findings supported Freeman's (2013) results that because of the stagnant labor market, individuals leaving the workforce going from employment to unemployment were higher than unemployment to employment because of the lack of employment opportunities created during the recovery of the 2007-2009 recession. Both Pfeffer et al. (2013) and Farooq and Kugler concluded that the disparity in the unemployment numbers of previous economic downturns and the recession of 2007-2009 revealed the demand for talented human capital participation in the labor market was a cyclical dilemma.

The movement of the unemployment rate of human capital parallels the expansion and contraction of a business cycle (Schüler, Hiebert, & Peltonen, 2014). Significant economic and recessionary indicators, such as gross domestic product, the unemployment rate of talented human capital, and the interest rate, are indicators to determine economic and labor market behavior (Lee & Ha, 2014). Using historical sales data obtained from the National Restaurant Association, Lee and Ha (2014) explored how the role of key economic indicators affect the restaurant industry during recessionary times. Lee and Ha discovered that key economic indicators might impact the income elasticity of the supply and demand of restaurants.

Comparably, Branch, Petrosky-Nadeau, and Rocheteau (2016) used a quantitative approach to explore the impact of financial and housing market turmoil and the unemployment of talented human capital. Branch et al. employed the Mortensen-Pissarides quantitative model to ascertain the economic and housing indicators created an excess labor supply of human capital, contributing to a rare phenomenon of long-term unemployment and permanent job eliminations.

The financial and housing market turmoil also contributed to the reduction of weekly hours worked or required of human capital (Stock, 2014). Pacitti and Fichera (2015) used a Phillip curve model for investigating and arguing the four measurements of the cost of job loss during this recession. The cost of job loss measurements utilized to determine the absence of human capital follow: (a) real weekly preplacement, (b) the average unemployment duration, (c) unemployment insurance, and (d) reemployment income. Pacitti and Fichera (2015) found that the cost of job loss implies that the current labor market and the economy are more vulnerable than signaled by the unemployment rate of human capital. Mortensen (2014), Branch et al. (2016), and Pacitti & Fichera (2015) believed the Great Recession of 2007-2009 caused the labor market participation to deteriorate into an acute recovery in many different dimensions (i.e., long-term unemployment, permanent job elimination, and lack of employment creation) with pernicious consequences for both human capital and U.S. economy.

The dramatic changes in the labor market create potential implications for the future of unemployment (Dean, 2013). Pfeffer et al. (2013) used a quantitative study to stress that a severe recession and slow recovery contributed to non-market growth. Likewise, Dean (2013) utilized a quantitative approach to underscore the high rate of unemployment, volatile economic and labor markets, economic uncertainty, job growth in the United States, and advanced economies of scales must happen to avoid a decade of stagnation in the labor market. Gabriel, Gray, and Goregaokar (2013) stressed until the hiring rate improves and the global financial markets gains momentum, lack of confidence in the future of the labor market for professionals is likely to remain, influencing both businesses and job seekers.

Human capital may view the practice of employment downsizing as a contemporary business practice and strategy for organizations used by senior managers to eliminate talented employees (Ngirande, Terera, & Mutodi, 2014). Senior managers choose to downsize for various reasons—primarily to increase their bottom line (Cascio, 2014). In a study of 224 Taiwan firms using a qualitative approach to determine the effects of downsizing, C. F. Tsai and Yen (2015) used information from the Taiwan Labor Department, the national management consulting businesses, and foreign corporations. C. F. Tsai and Yen discovered that conducting an efficient, responsible organizational downsizing can produce a positive outcome and enhance HRM practices amid the phenomenon. Similarly, Cascio (2014) argued managers initiate downsizing strategy as a reaction to internal or external phenomena or to prepare for expected change needs to adopt effective human capital downsizing as a common strategy.

Cascio (2012) isolated external and internal factors for employment downsizing. Some of the external downsizing factors include (a) declining demand, (b) cutting costs, (d) imitating competing firms, (e) competing in a global market, (f) pooling a workforce, and (g) improving technology. A few of the internal factors that cause downsizing include (a) horizontal mergers or acquisitions, (b) corporate governance practices, (c) CEO demographic characteristics, and (d) human resource policies.

Many senior managers use employment downsizing to improve performance (Gandolfi & Hansson, 2015), constrain the budget (Agwu et al., 2014), improve efficiency (Goesaert et al., 2015), to reduce costs (i.e., human assets; Luan et al., 2013), to improve productivity (Agwu & Carter, 2014), to gain a competitive advantage (Saif et al., 2013), and maintain corporate sustainability (Ferris, 2013). Fundamentally, senior managers view economic performance as the alpha and omega of employment downsizing (Chhinzer & Currie, 2014). These managers use different economic indicators such as return on assets, profit margin, earnings per share, revenue growth, and market capitalization to measure financial performance (Dai & De Meuse, 2013). To increase organizational efficiency, some senior managers initiate downsizing.

Goesaert et al. (2015) utilized a unique dataset to study the productivity and profitability of 500 German firms after a downsizing event. Similarly, Chhinzer and Currie (2014) sampled 178 downsizing announcements paired with a mixed method approach to explore downsizing and financial performance as a multidimensional event. Both Chhinzer and Currie and Goesaert et al. discovered productivity and profitability decreased because of the downsizing of human capital. Conversely, Dai and De Meuse (2013) used 731 Fortune 1000 companies to assess the financial impact of downsizing after the recession of 2007. Dai and De Meuse discovered that the decision of senior managers to downsize positively affected the operational and financial performance. Agwu and Carter (2014), Chhinzer and Currie, and Goesaert et al. opined employment downsizing might not yield the immediate or expected financial performance benefit or increase productivity.

Downsizing Management

Some senior managers perceive human capital as a liability (Cascio, 2014). Human capital represents a significant part of production costs. Under the cost-cutting approach, human capitals are the initial target. Senior managers need to recognize human capital as valuable business assets (Gounaris & Boukis, 2013).

Rao (2015) argued that human resource planning is necessary for an organization to succeed in the 21st century. Senior managers must strategically analyze, restructure, and deploy employees on a continuous basis (Galeazzo, Furlan, & Vinelli, 2017). Galeazzo et al. (2017) utilized a quantitative study to explore and analyze key factors of business infrastructure (i.e., strategic alignment). Galeazzo et al. discovered when vetting employees, human resource managers must consider all costs, including those associated with future employment needs. As a direct result of human resource planning, Rao believed human resource managers would feel more empowered and competent to deal with employment downsizing.

Downsizing Strategies

Traditional workforce downsizing practices. The reduction of human capital, known as workforce downsizing, is not a new business phenomena (Gandolfi, 2013). Over the past three decades, employment downsizing has affected commerce, businesses, governments, and human capital and has remained a dominant contemporary downsizing strategy (Cascio, 2014; Luan et al., 2013). Senior managers can use headcount reductions, redundancies, rightsizing, and smartsizing as an employment downsizing approach to reduce human capital (Gandolfi, 2013). Luan et al. (2013) studied 436

Taiwan companies from 11 various industries, including food, textiles, automotive, electronic, cable, and electronics. Luan et al. ascertained traditional workforce downsizing might lead to wrong sizing of human capital. Baidoun and Farraj (2014) opined employee reduction could be accomplished using attrition and voluntary termination.

Contemporary workforce downsizing practices. Modern-day employment downsizing practices exercise the elimination of positions as a reaction to an economic or organizational event (Cascio, 2014). Retrenchment, downscaling, and downscoping are typical tactics used to manage the event of purging human capital. These three employee reduction tactics are comparable to workforce downsizing, delayering, and plant closings (Brauer & Laamanen, 2014).

Retrenchment. Human resource managers use retrenchment to focus on an internal organization. These managers utilize this practice to support the centralization of internal activities, the specialization of production aspects, and the realignment of managerial responsibilities (Tsao, Newman, Chen, & Wang, 2016). Human resource managers may improve productivity results from reengineered processes by eliminating jobs (Asikhia & Awolusi, 2015). Interestingly, human resource managers may use retrenchment to defend and enhance the organization's current competitive advantage (Gandolfi, 2013). At the same time, senior managers may be less desirable to use retrenchment as a downsizing approach if an organization's resources have limited competitive viability (Brauer & Laamanen, 2014).

Tangpong, Abebe, and Li (2015) used a temporal approach using 96 U.S. companies to explain the effectiveness of retrenchment as an employment downsizing strategy. Tangpong et al. argued retrenchment as an employee reduction approach be used to embrace and augment organizational performance when an organization's ability to obtain scale and economies is limited. According to Gandolfi (2013) and Tangpong et al., senior leaders use retrenchment to reengineer and eliminate talent to improve productivity in the early stages of downsizing adept at having a successful organizational performance turnaround.

Downscaling. Downscaling, as an employee reduction approach, eliminates human capital as a resource in response to reduced workforce demand (Flammer & Ioannou, 2015). Downscaling is a process in which both the human and physical resources are eliminated, vacating a competitive advantage in the marketplace (Gandolfi, 2013). Senior managers tend to be an advocate of downscaling for various reasons. For example, human resource managers may adopt employee downscaling because senior managers elected not to continue pursuing a market or product diversification that may have allowed the organization to increase their need for more employees (Flammer & Ioannou, 2015). When the relationship between human capital and a market or product diversification is detached, yet the product line and market scope remain the same, such an employment reduction strategy is considered a form of downscaling (Gandolfi, 2013).

Downscoping. The term downscoping refers to reducing an organization's vertical or horizontal scope (Gandolfi, 2014). Senior managers may attain downscoping through a spin-off, divestiture, or eliminating an unrelated core business (Warui, Kimermia, Mungara, Bateyo, & Njau, 2015). Conceptually speaking, vertical downscoping is an organization's ability to outsource activities that can be performed by others more efficiently or at a lower cost (Gandolfi, 2014).

Gituma (2016) explored the influence of restructuring on organizational performance (i.e., strategic reorientation) on the Kenya telecommunication industry. Gituma used both qualitative and quantitative approaches to analyze the data of 173 senior and middle-level managers and discovered that downscoping impacts the telecommunication industry in Kenya. Gandolfi (2014) contended that managers use retrenchment as a downsizing strategy to maintain and potentially strengthen an organization's competitive advantage in the marketplace. In contrast, Gross (2015) believed downscaling and downscoping of employees are exit strategies to vacate, thus creating a competitive environment and leave employees to be exploited.

Downsizing is known as a "weapon of mass cleansing" (Agwu et al., 2014, p. 4), to achieve positive organizational outcomes (Bragger et al., 2014). Senior managers choose to downsize as a reaction to an event or phenomenon or to avoid economic decline (P. C. F. Tsai & Shih, 2013). Regardless of the rationale, senior managers use downsizing as a strategic tool for effective organizational management (Agwu & Carter, 2014). P. C. F. Tsai and Shih (2013) conducted a study of 154 Taiwan local and multinational firms to investigate a responsible downsizing strategy that achieved positive organizational change. Similarly, Agwu and Carter (2014) focused on the downsizing activities of 10 Nigerian banks. Both P. C. F. Tsai and Shih and Agwu and Carter concurred that senior managers should consider the effects of downsizing and take the necessary steps to minimize the consequences of downsizing on organizational performance.

According to Muñoz-Bullón and Sánchez-Bueno (2014), senior managers view human capital as a cost, not an asset, and will choose to downsize as an immediate solution to an organizational issue. In recent years, employment downsizing is becoming an integral feature of an organizational landscape (Gross, 2015). Conversely, senior leaders should communicate and explain to their employees the reasons for employment downsizing (Van Dick, Drzensky, & Heinz, 2016). Communication can act as an intermediary during downsizing (Bayardo, Reche, & De La Cabada, 2013). Van Dick, Drzensky, and Heinz (2016) conducted a lab experiment to identify the effect of employment downsizing on employees. Van Dick et al. found that the reduction of human capital may realize healthier results if objectives of downsizing are publicized internally in advance.

Gandolfi (2013) suggested six downsizing strategies/tactics that organizations should consider when commencing a downsizing event. First, view human capital is an asset rather than a cost. Second, ensure that a comprehensive long-term downsizing plan is present for organizational employees to review. Third, allow managers and employees to partake in the downsizing planning stage. Fourth, instruct senior leaders to be transparent and support employees during the downsizing process. Fifth, engage in straightforward and transparent communication between managers and employees about the reason for employment downsizing.

Senior managers used employment downsizing as a successful management strategy to achieve positive organizational outcomes (Bragger et al., 2014). Gross (2015) used literature to explore if downsizing is viewed as an organizational strategy means to build a competitive edge and organization efficiency. Gross argued employment downsizing as a strategy will frequently be used by senior and human resource managers to achieve and maintain a competitive advantage in the marketplace. As such, these managers must analyze employment downsizing plans and offer best practices or strategies for implementing such plans successfully (Gandolfi, 2013). Agwu et al. (2014) believed senior managers who have adopted employment downsizing plans and activities should include planning, investing in the analysis, encouraging participation from all stakeholders, and thriving from the exchange of information. Employment downsizing activities as a strategy of systematic reduction of employee headcount are used to produce financial, organizational, and social results (Gandolfi, 2013; Gross, 2015; Van Dick et al., 2016).

Role of the Human Resource Manager

Human resource managers must undertake a more strategic role in managing human capital when changes shift the competitive market environment (Sparrow, Farndale, & Sculliond, 2013). With an increase in competition, organizations must become more adaptable, robust, agile, and customer-focused in human capital (Gaikwad & Berad, 2015). Thunnissen, Boselie, and Fruytier (2013) believed in not attracting and retaining human capital amid an economic downturn; an organization may find itself outrivaled by its competition. Oladapo (2014) used a quantitative approach to identify how senior and human resource managers must rethink their talent management strategies. Oladapo discovered human resource managers industry-wide are rethinking and shifting priorities to respond to new human capital and talent management challenges. Ferris (2013) opined the need for human resource managers to become strategic partners, employee sponsors or advocates, and change mentors—being a critical resource for senior management, which is vital to the sustainability of the organization (Ferris, 2013).

Senior managers and employment human resource managers can be invaluable during an adverse economic climate (P. C. F. Tsai & Shih, 2013). Human resource managers can bridge the perception gap by offering a perspective on workforce performance that could drive smarter business decisions (Brauer & Laamanen, 2014). Navalino, Nimran, Astuti, and Hamid (2014) explored the effect of downsizing on managers and organizational climate and performance using a quantitative approach. Navalino et al. implied the facilitator of employment downsizing should possess characteristics of sensitivity and empathy so that the organization can realize a successful downsizing endeavor. Navalino et al. argued human resource managers with these characteristics could with compassion communicate the elimination and displacement of human capital. Thunnissen et al. (2013), P. C. F. Tsai and Shih (2013), Oladapo (2014), and Navalino et al. believed successful human resource managers create human resource/talent retention benchmarks and alternatives that will be effective during employment downsizing.

Employee Retention Strategies

Retention of talent is a challenge for contemporary managers (Pearlman & Shaffer, 2013). Retaining employees contributes to organizational sustainability, whereas employee retention strategies relate to competitive advantage strategy (Ferris, 2013). During their tenure, some senior managers encounter an unpredictable economic environment that may affect the retention of human capital (Shahid & Azhar, 2013). One of the tasks of a senior manager is to stabilize and retain employees during downsizing. (Pearlman & Shaffer, 2013). Employee retention strategies are an integral part of an organization's business strategy (Cascio, 2014). Human capital may be one of the most valuable resources of an organization 's competitive edge (Ferris, 2013). Thus, retaining talented human capital may be crucial to sustainable competitive advantage (Saif et al., 2013).

The current labor market necessitates the development of an employee retention strategy (Deery & Jago, 2015). Several strategies to retain talent include job-sharing, short-term compensation, shortened work weeks, early retirement, furloughs, and voluntary time off (Bragger et al., 2014). Managers may utilize these initiatives during downsizing to increase employment entrust and retain an entire workforce. Adalsteinsson and Haraldsdottir (2013) used a qualitative approach to investigate the role of human resource managers amid a negative economic cycle. Adalsteinsson and Haraldsdottir opined senior and human resource managers who advocated employee retention strategies might mitigate the adverse effects to perceive leaders as sensitive and empathetic to the best interest of the employee during downsizing.

Senior managers and stakeholders view human capital as a business asset to provide the organization with a competitive advantage in the marketplace (Gounaris & Boukis, 2013). Consequently, losing talented human capital could negatively affect the business strategy of an organization (J. I. Hancock, Allen, Bosco, McDaniel, & Pierce, 2013). Gounaris and Boukis (2013) explored and uncovered that employment relationships are voluntary; employees have the option of remaining in the organization or leaving it. Employee retention practices can influence an employee's desire to transform the organization (J. I. Hancock et al., 2013). Both Gounaris and Boukis and J. I. Hancock et al. (2013) denoted that employee retention research disclosed managers need to create a consistent employee work environment amid a crisis and that managers can use effective employee retention strategies (i.e., job-sharing, furloughs) to retain talent and catapult organizational sustainability.

Challenges to Employee Retention

The lack of sufficient human resource practices is the reason for challenges confronting organizations attempting to retain talented employees (Choi & Whitford, 2015; Sikora, Thompson, Russell, & Ferris, 2016). Ineffective human resource practices have often been associated with poor employee retention (Sikora et al., 2016). Budgetary constraints, expanded services, control systems, political context, limiting independence and flexibility, and traditional human resource strategies continue to serve as potential barriers to creating and implementing employee retention strategies (Choi & Whitford, 2015).

Contemporary senior and human resource managers encounter various retention challenges (Tangthong, Trimetsoontorn, & Rojniruntikul, 2014). Samson (2013) denoted there are several critical employee retention challenges. Some of the challenges confronting managers include the lack of talented and professional human capital and predicted labor shortage as a result of Baby Boomers nearing retirement age (Samson, 2013). Other factors challenging managers are the incapacity to shift from more general retention programs (e.g., employment ladders and seniority initiatives) to more targeted initiatives—shifting expectations of the new workforce, employment instability among Generation X and Generation Y, and workforce diversity (Samson, 2013). Tangthong et al. (2014) explored how talent management practice impacts business performance using a quantitative method approach. Tangthong et al. discovered that to challenge the critical employment retention issue, senior and human resource managers must diagnose the nature and cause of downsizing. Tangthong et al. opined managers should strategically review human capital market influences to determine what human capital market influences may lead managers to target and organize employment retention initiation as a business strategy.

Talent Management

Human capital is perilous to the success of an organization (Park & Levy, 2014). Talent management of human capital is considered a critical foundation of an organization’s success and organizational sustainability (Al Ariss et al., 2014; Ferris, 2013). In response to the retention challenge, managers must consider effective methods for managing employees’ skills and abilities (Brymer, Molloy, & Gilbert, 2014). Brymer et al. (2014) used a resource-based theory to establish talent pipelines. Brymer et al. posited the framework of a talent pipeline as a means to develop human capital and create an advantage over rivals. Brymer et al. and Al Ariss et al. (2014) believed having a solid foundation of human capital and employee retention is critical to organizational outcome and asserted there is no perfect scheme for retaining employees.

Senior managers may not remain competitive if the organization fails to retain talent (Oladapo, 2014). Managers who reported the use of retention strategies to manage their employees discovered a valued source of competitive advantage (Gounaris & Boukis, 2013). In a quantitative study, Oladapo (2014) found that managers who retain the best workforce are proactive in reducing unmanaged employee retention rate. These managers created strategies that contained guidance for the prioritization of employee retention as a strategic business objective (Oladapo, 2014). Cohen (2013), and Goesaert et al. (2015), and Oladapo believed effective leadership contributes to business efficiency by managing human capital, transforming employee retention within the organization, and capturing or maintaining a competitive advantage in the marketplace.

Best Practices for Talent Retention

Downsizing may not be the only alternative for senior managers experiencing challenging economic conditions (Cascio, 2014). Reduction of employment wages, job sharing, short-term compensation, shortened work weeks, early retirements of seasoned employees, employee furloughs, and voluntary time off are workforce alternatives (Gandolfi, 2013). Senior managers can utilize industry strategies such as benchmarking surveys and exit interviews to retain talent (Al Ariss et al., 2014). Cappelli and Keller

(2014) used a quantitative approach to explore challenges associated with managing and retaining talent in this contemporary labor market. Cappelli and Keller found that wage reductions, furloughs, and shortening the work week may allow leaders to lower operating costs without reducing staff. Gandolfi (2013), Al Ariss et al. (2014), Cascio (2014), and Cappelli and Keller and believed senior and human resource managers could use best practices retention strategies to increase talent retention.

Job-sharing and short-term compensation. Employee job-sharing and short-term compensation offer business leaders an opportunity to reduce labor costs without hiring and training additional personnel (Freeman, 2013). These employee initiatives can act as barriers between modest labor demand and deviations in the industry that might require additional labor (Gandolfi, 2013). Employee job-sharing and short-term compensation may lead to organizational underperformance (Freeman, 2013); senior managers may require employment strategies such as early retirement.

Early retirements. Retiring employees before the age of maturity might be an alternative to employment downsizing (Huber, Lechner, & Wunsch, 2016). Early retirement is an option that leaders may use to encourage seasoned employees to leave voluntarily (Cascio, 2014). The exit of seasoned human capital may allow for younger employees to remain with the organization. Frequently, early retirement removes financial penalties like unemployment compensation and health insurance associated with early termination (Huber et al., 2016). Early retirement for some seasoned employees might be a viable incentive (Memon & Sultan, 2015). If an employee retires under agreeable terms with the organization, it may be reasonable to believe the employee would return to the organization on a temporary basis (i.e., consultants) if conditions warranted such a decision.

Depleting vacation or reducing wages. Forward-thinking senior managers may provide viable results to address an organization's cyclical business cycle. These managers may use staffing options such as depleting vacation or reducing wages as a contrast to early retirement (Huber et al., 2016). Many talented employees who might not be ready to vacate the workforce because of financial instability and the rising cost of health care may welcome the chance to deplete vacation hours, returning when business conditions improve (Freeman, 2013). Other employees might work additional hours at regular pay to take time off when demand is slow—compensatory time off (U.S. Congress, 2017). This employee alternative will allow senior managers (public and private) to offer employees the opportunity to select compensatory time off instead of earn overtime wages (Huber et al., 2016; U.S. Congress, 2017). Senior managers who find the means to strategically adjust labor supply to market demands may be less vulnerable to economic recession than leaders who rely on downsizing to adjust labor costs (Freeman, 2013). Consequently, senior managers may have healthier options such as delaying raises, cutting temporary staff, raising employee contributing to benefit plans, and canceling business travel than downsizing during negative business cycles (Cascio, 2014).

Senior and human resource managers who utilize alternative downsizing strategies (i.e., freezing salaries, postponing or eliminating raises, freezing hiring, or reducing or suspending matching contributions to company-sponsored savings plans) may eliminate the causes for employee elimination (i.e., layoffs) typically associated with downsizing. Human resource managers must know the skill level of their employees to avoid ambiguities about their capabilities (Freeman, 2013). How managers communicate information concerning the reorganization of human capital, the implementation of this process, and the possibility of using alternative downsizing methods and strategies may lead to successful employment downsizing (Appelbaum, Karasek, Lapointe, & Quelch, 2015). Managers may consider employment downsizing an accomplishment when labor cost is diminished to help the organization remain competitive in the marketplace (Gross, 2015). Hence, HRM may be the root of effective downsizing initiatives.

Support of the Relationship of the Study to Previous Research and Findings

Sparrow et al. (2013) used a qualitative case study approach to investigate the role of human resource managers as a downsizer during labor cost crises. Sparrow et al. provided insight into how users of business models can centralize and decentralize a decrease in human capital during an adverse market calamity. They suggested that communicating business and human resource strategy objectives to human capital during adverse and talent strategies can lead to employee retention.

Similarly, Festing and Schäfer (2014) examined small and medium-sized enterprises to a conceptual and empirical understanding of talent management practices amid an economic downturn. These scholars investigated the need for talent management strategies such as attracting and selecting new talent while developing and retaining current talent. Festing and Schäfer found that human resource managers were performing as a strategist to help senior managers cope with the war for talent during adverse economic business cycles.

The purpose of the current qualitative multiple case study was to explore strategies that some human resource managers use to retain talented employees during downsizing. The case study participants used their strategies when met with an organizational crisis, like downsizing. The review of the professional and academic literature contained scholarly articles, seminars, and contemporary literary works. The literature review contained summarizations, similarities, and differences of viewpoints relating to the research topic. Based on the research and review of the literature, the employee retention strategies used by contemporary human resource managers may contribute to the retention of talent during downsizing. These retention strategies may also influence business performance and the labor market participation rate of human capital amid downsizing.

Transition

Section 1 included the foundation of the study, the background of the problem, the problem statement, the purpose statement, as well as the nature of the study to validate my selection of a qualitative method and case study design. Section 1 also included the research question, interview questions (see Appendix A), conceptual framework, operational definitions, assumptions, limitations, and delimitations of the study. Section 1 also contained the significance of the study and a review of the professional and academic literature. The literature review included contemporary literature relating to the following sections and subsections: institutional theory of downsizing, employment downsizing, role of human capital leaders, employee retention strategies, and best practices for talent retention. Section 1 concluded with a transition summary.

Section 2 consists of the restated purpose statement, the role of the researcher, the selected participants, a comprehensive description of the research methodology and design, the population and sampling, ethical research, data collection instruments and technique, data organization technique, data analysis, and reliability and validity of the study.

Section 3 commences with an introduction comprising the purpose statement, research question, and findings. Section 3 also includes the application to professional practice, implications for social change, recommendations for action and future research, and a conclusion of my reflections.

Section 2: The Project

The purpose of this qualitative case study was to explore strategies some human resource leaders use to retain talent during downsizing. Using semistructured interview questions, I collected data from six human resource leaders from three retailers who used strategies to retain talent during downsizing. I also collected data through the review of corporate documents such as the annual report and corporate website of each of the service industry corporations. Understanding strategies human resource leaders use to retain talent during downsizing may provide knowledge that may help in retaining talent during a downsizing phenomenon. Section 2 of this study contains the restatement of the purpose, the role of the researcher, details related to the research participants, research method and design, population and sampling, ethical research, data collection instruments, data collection techniques, data organization techniques, and reliability and validity of the study.

Purpose Statement

The purpose of this qualitative multiple case study was to explore strategies some human resource managers use to retain talented employees during downsizing. The sample population consisted of two human resource managers from three different service industry corporations located in metropolitan Atlanta, Georgia, for a total of six participants whose strategies help them retain their talented employees during downsizing.

Human resource managers may use the findings of this case study to create useful strategies for retaining talented employees during downsizing. The implications for positive social change include the potential for business and human resources leaders to eliminate personal bias and promote workplace equality, thereby sustaining labor market participation of these individuals in their respective communities. P. Tsai and Yen (2015) posited that an effective downsizing strategy for retaining talented employees could positively influence workforce reduction by minimizing the number of families impacted and the social chaos caused by downsizing. The findings of the current case study may be used to contribute to positive social change by supporting displaced employees with resources like outplacement, resumes, cover letters, interview coaching, counseling for displaced employees and their families, and recommendations for other positions to mitigate the detrimental effect of unemployment on family life, thereby sustaining the economic wealth and labor market participation of individuals in their respective communities.

Role of the Researcher

I was the primary collection instrument for the current qualitative multiple case study. My role as the research instrument of this study included the selection of suitable research methodology and design, participant recruitment, data collection, and data analysis. My role involved conducting semistructured interviews, transcribing responses, reviewing organizational artifacts (annual reports and websites), analyzing results to identify themes, and verifying findings for reporting. Having worked in the service industry sector as a business partner, I was familiar with employment downsizing. I had a prior employment relationship with some human resource leaders participating in this study. This study included individuals in the metropolitan Atlanta, Georgia, where I live.

Backyard research is legitimate and valid but can diminish the integrity of collected data (Kim, 2014). I used an interview protocol and member checking to mitigate researcher bias.

The Belmont Report, established in 1979, contains unifying ethical principles for conducting behavioral research involving human subjects (Nicolaides, 2016). The Belmont Report contains three unifying ethical principles: respect for a person, beneficence, and justice (Nicolaides, 2016). The consent form for my study contained the guidelines for providing informed consent, assessment of benefits and risks, and the selection of research subjects (see Check, Wolf, Dame, & Beskow, 2014). I used a consent form that contains similar content. Nicolaides (2016) suggested that all researchers should adhere to the ethical standards and protocols outlined in the Belmont Report. I adhered to the ethical standards and protocols as outlined in the Belmont Report.

Researcher bias is present in all social science research (Fusch & Ness, 2015; Smith & Noble, 2014). This bias can be unrecognizable and sometimes unavoidable (Anderson & Hartzler, 2014). Frequently, researchers have trouble receiving and understanding the viewpoint of others (Fusch & Ness, 2015). However, if researchers acknowledge their subjective views and the existence of a personal lens, this allows the researcher to hear, interpret, and understand the behavior and experiences of others (Malone, Nicholl, & Tracey, 2014). An interview protocol (see Appendix B) and member checking helped me diminish bias. I asked each participant the same questions to ensure I was not including ideas based on personal experiences or biases.

Dikko (2016) described an interview protocol as a set of rules and guidelines to be used for the conduct of the interviews. The interview protocol for the current study included an inquiry-based conversation with interview questions that aligned with the research question for feedback and member checking. Member checking is the validation protocol for reviewing and authenticating research data (Harvey, 2015). Researchers use member checking as a part of the interview protocol to diminish personal bias when analyzing and interpreting the findings (Anney, 2014) and to enhance the reliability and trustworthiness of a multiple case study (Yin, 2017).

Researchers also use triangulation to corroborate multiple sources (Moore, Prentice, & McQuestion, 2015). Triangulation helps a researcher to cross-examine the integrity of participants' responses (Anney, 2014). I used methodological triangulation to strengthen the quality, reliability, and validity of the interview protocol. I used the semistructured interview questions and review of company documents to ensure the accuracy of the data. Methodological triangulation is useful for collecting data from multiple sources to ensure data saturation (Carter, Bryant-Lukosius, DiCenso, Blythe, & Neville, 2014). Data saturation occurs when responses to the interview questions become repetitive (Fusch & Ness, 2015) and no new information is being added or revealed (van Rijnsoever, 2017). I achieved data saturation after the initial member-checking process and review of organizational artifacts revealed no new information.

Participants

Qualitative researchers strive to identify and recruit participants who meet the selection criteria and represent the deepest and most abundant sources of information related to a phenomenon (Newington & Metcalfe, 2014). Recruiting enough participants is critical to the success of a study (Timothy, Sefita, & Bruce, 2015). I used purposive sampling to gain access to two human resource managers from three different service industry corporations located in metropolitan Atlanta, Georgia, for a total of six participants. Researchers use multiple sources of evidence to collect data to maximize the quality of the study (Yin, 2017). Yin (2017) posited that using multiple sources of evidence could be beneficial for qualitative researchers.

My participants met the following criteria for participation: (a) held or previously held a human resource or talent management position with a Fortune 500 corporation in the service industry sector; (b) located in metropolitan Atlanta, Georgia; and (c) had at least 5 years of experience using talent management retention strategies to retain talented employees during downsizing. A research ethics board controls the interaction between a researcher and participant (Babbie, 2015). To ensure the protection of participants, I adhered to research ethics principles and obtained permission from the Walden Institutional Review Board (IRB) to avoid human rights violations. This qualitative case study's IRB approval number was 06-20-19-0345118.

To gain access to participants, I used my personal LinkedIn database to connect with six current and former human resource or talent management managers. I emailed potential participants a participant consent form for review. This participant consent form outlined the scope of the qualitative case study. Interested individuals acknowledged their willingness to participate in this study by electronically replying to the email with the words "I consent." To acknowledge receipt of the participant consent form, I emailed or telephoned each participant to schedule a telephone conversation to discuss an interview appointment.

In qualitative research, developing a researcher–participant relationship is fundamental to the success of the study (Goldstein, 2017). Researchers must be engaging and empathetic to participants to maintain a relationship of trust (Neusar, 2014). As the researcher of this study, I created an honest, egalitarian relationship and employed ethical consciousness and mindfulness with the participants. When constructing the researcher–participant relationship, I was open and explained my intentions, values, and positions concerning this study to each participant. I employed the ethics of care and concern for each participant. Building a stable researcher–participant relationship is critical to the efficacious conclusion of a study (Neusar, 2014). I established a researcher–participant relationship with each interviewee who had successfully used his or her strategies to retain talented employees during downsizing.

Research Method and Design

Selecting a suitable research method and design is a vital part of a study. Tully (2014) argued that the selection of the research method and design is based on whether the method and design are appropriate for answering the research question. The three types of research methods are qualitative, quantitative, and mixed methods (Yin, 2017). Researchers use the qualitative method to explore and interpret the *what*, *how*, or *why* of a phenomenon (McCusker & Gunaydin, 2015; Yin, 2017) where limited or no understanding exists (J. S. Johnson, 2014). Researchers use the quantitative method to test hypotheses (McCusker & Gunaydin, 2015) or to examine the relationship or differences between dependent and independent variables (Molina-Azorín & López-Gamero, 2016). The mixed methods approach is used by researchers who need to include qualitative and quantitative methods to answer research questions (Birchall et al., 2016). The purpose of the current multiple case study was to explore strategies some human resource managers use to retain talented employees during downsizing.

Research Method

Researchers have the option of studying a phenomenon using a qualitative, quantitative, or mixed methods approach (Babbie, 2015). I selected qualitative methodology to guide the current study. Qualitative research is a method of inquiry for exploring and discovering individual or group insights about a social or human phenomenon (Khan, 2014). Researchers use the qualitative method to support the exploratory nature of the research question (Yin, 2017) and to provide flexibility for an in-depth dialogue for uncovering features about a phenomenon (Marshall & Rossman, 2016). In contrast, the quantitative method is used to collect numerical data to deliver a precise measurement (Eyisi, 2016). Researchers using the quantitative method do not have the flexibility to explore research problems through a variety of lenses (DeFanti, Grafton, Levy, Manovich, & Rockwood, 2015). The mixed methods approach is a method of inquiry in which the qualitative method or the quantitative method is not suitable alone for a study; each method is needed to support a study (Onwuegbuzie, Gerber, & Schamroth-Abrams, 2017). Neither the quantitative method nor the mixed methods approach was appropriate for the current case study because the study did not require any testing of hypotheses or examination of statistical trends.

Research Design

A research design is a blueprint to address the research question and draw a coherent and logical conclusion for findings of a study (Tully, 2014). Phenomenological, ethnographic, narrative, grounded theory, and case study are the most commonly used designs in qualitative research (S. Lewis, 2015). The phenomenological design is suitable for gaining an in-depth and in-context understanding of the phenomenon from the perspective of the research participant (Gill, 2014). The phenomenological approach was not suitable for the current study because I intended to explore strategies that some human resource leaders use to retain talented employees during downsizing. Ethnography is used to describe behavioral patterns, conditions, and beliefs of cultural groups through participant observation and interviews in a natural setting for a prolonged period (Mannay & Morgan, 2015). Exploring behavioral patterns, conditions, and beliefs of cultural groups regarding downsizing and talented employees was not the intent of the current study. Therefore, the ethnographic approach was not suitable for this study. Researchers use the narrative design for collecting and analyzing stories, field notes, interviews, letters, interviews, photos over an extended period to recount the life experience of individuals (Dailey & Browning, 2014). The narrative approach was not appropriate for the current study because narrating life experiences was not the primary focus. The grounded theory design is useful when developing theories (Charmaz, 2014). The grounded theory design was not suitable for the current case study because the intent was is not to develop theories on retaining talented employees during downsizing.

A case study design is useful when exploring the details and complexities of a phenomenon for a better understanding (Yin, 2017). Qualitative researchers use the case study design to explore a multifaceted event or phenomenon in depth in the natural context of the event or phenomenon (Harrison, Birks, Franklin, & Mills, 2017). A case study researcher explores, describes, or analyzes an event or phenomenon to determine why and what occurred (Yin, 2017). Researchers often use multiple case studies to explore and develop emerging viewpoints to gain an understanding of differences and similarities about the phenomenon (Vohra, 2014).

A multiple case study design is beneficial when comparing several organizations or domiciles (Yin, 2017). A descriptive case study design is fitting for convincing someone that a phenomenon is relevant (De Massis & Kotlar, 2014). Researchers use an explanatory case study design to explain and understand why a phenomenon takes place (Baškarada, 2014). An exploratory case study design is useful to understand how a phenomenon occurred (Yin, 2017). The descriptive case study design was not appropriate for the current study because the intent was to explore strategies some human resource leaders use to retain talent during downsizing. An exploratory case study design is beneficial when using multiple sources of evidence to answer the research question (Yin, 2017). An exploratory multiple case study design was used to guide the current study.

In qualitative research, data saturation ensures the dependability of findings (Fugard & Potts, 2015; Fusch & Ness, 2015). Fusch and Ness (2015) emphasized that failure to reach data saturation can impact the quality of the research conducted and hinder content validity. I achieved data saturation after the initial member-checking process and review of organizational artifacts revealed no new information.

Population and Sampling

In qualitative research, a researcher determines whether the target population of individuals can share their experiences and thoughts to answer the research question (Asiamah, Mensah, & Oteng-Abayie, 2017). The targeted population for the current qualitative multiple case study included current and former human resource managers with Fortune 500 service industry corporations who had successfully retained talented employees during downsizing. These managers were proficient in implementing downsizing and talent retention strategies during employment downsizing. The participants included two executive talent managers, two talent managers, an employee relations manager, and a human resource analyst.

Sampling is fundamental to the practice of qualitative interview-based research (Robinson, 2014). Robinson (2014) denoted a 4-point technique for sampling consists of (a) setting a sample universe, (b) selecting a sample size, (c) devising a sampling strategy, and (d) sourcing a sample population. For the current case study, I used purposive sampling to obtain human resources managers with knowledge about the overarching research question. The purposive sampling is a nonrandom method of selecting each participant to partake in the study (Suen, Huang, & Lee, 2014). Purposive sampling allows a researcher to gain an understanding of the participant’s scholarship and perceptions relating to a phenomenon (Etikan et al., 2016). Palinkas et al. (2015) posited researchers use purposive sampling in qualitative research to identify and select costly case information related to a phenomenon of interest. Purposive sampling is a suitable technique for this case study because of in-depth information-gathering potential.

Qualitative researchers use a sample size to acquire the number of participants suitable for the study's design (Robinson, 2014). A sample size of the population is essential for ensuring there is enough data for credible analysis and reporting (Martínez-Mesa, Gonzalez-Chica, Bastos, Bonamigo, & Duquia, 2014). Therefore, a qualitative researcher should choose the sample size that has the best opportunity for achieving data saturation (Fusch & Ness, 2015). For a case study design, a small sample size of the population is suitable (Molenberghs et al., 2014). Guest, Bunce, and Johnson (2006) acknowledged that as little as six participants are adequate for achieving data saturation in the absence of a massive sample size. In the current study, I used a sample size of two human resource managers from three different service industry corporations operating in metropolitan Atlanta, Georgia, for a total of six participants. These research participants are individuals who provided in-depth responses to the interview questions because these managers are knowledgeable about and experienced in the phenomenon and have successfully retained talented employees during downsizing.

Researchers must engage an adequate number of participants to obtain sufficient data to achieve data saturation (Guest et al., 2006; Morse, 2015). Data saturation occurs when participants' interview responses are repetitive and redundant (Fusch & Ness, 2015). In other words, data saturation materializes when no new information is being added or revealed (van Rijnsoever, 2017). When a researcher fails to achieve saturation, their failure compromises the quality and validity of the research (Fusch & Ness, 2015). I achieved data saturation after the initial member-checking process and review of organizational artifacts rendered no new information.

The concept of saturation involves selecting an appropriate sample size (Suen et al., 2014) and using multiple sources of evidence to ensure the richness of the collected data (Yin, 2017). Researchers can also use triangulation to achieve data saturation (Fusch & Ness, 2015). For this case study, I used semistructured interview data and organizational artifacts (i.e., annual reports and websites) to triangulate and obtain the thickness and richness of the data and develop rigor toward achieving data saturation.

The role of a researcher is to establish a criterion strategy to select appropriate participants suitable for a research study (Leedy & Ormrod, 2015). The following criteria defined participation inclusion for this case study. The participant's prerequisite included (a) currently hold or previously held a human resource or talent management position with a Fortune 500 corporation; (b) possess at least 5 years of experience in the service industry; (c) with a company located in metropolitan Atlanta, Georgia; and (d) have experience in downsizing and talent retention strategies. According to Yin (2017), researchers should choose the sample size that has the best opportunity for exploring the details and complexities of a phenomenon for a better understanding. Hence, researchers should also choose a suitable sample size to ensure quality control and data replication is present to support the case study (Morse, 2015).

An interview venue can offer a comfortable and nonthreatening interview setting for the participant (Roman, 2016). Interviews conducted in a comfortable interview setting allows participants to share information with little to no interruptions (Sarma, 2015). I conducted face-to-face interviews at the workplace of two participants and a mutually convenient location for four participants that allowed for privacy and trust. Each face-to-face interview lasted approximately 45 minutes.

Ethical Research

Researchers use ethical standards and protocols to control the interaction between a researcher and a participant during all stages of a qualitative study (Sanjari, Bahramnezhad, Fomani, Shoghi, & Cheraghi, 2014). To ensure the ethical standards of the study, I sought the permission of Walden's IRB to conduct this contemporary case study. Once IRB approval was granted to conduct this contemporary study (Approval # 06-20-19-0345118), I abided by the Office of Research Ethics and Compliance, Institutional Review Board for Ethical Standards in Research, and Walden's IRB ethical standards practices. I also adhered to the Belmont Report of 1979 ethics of research involving the human subject principles of (a) respect of persons, (b) beneficence, and (c) justice.

The individuals interested in participating in this study received a notification to execute the Participant Consent Form electronically and were instructed to reply in the same manner stating "I consent." The Participation Consent Form contained the (a) purpose of the study, (b) responsibility of researcher for ensuring autonomy and confidentiality, (c) affirmation of voluntary participation, (d) the presence of an audio-recording device for documentation, and (e) collection of business documents. The Participation Consent Form also contained a disclosure that participation in the study was voluntary with no incentives or compensation, and withdrawal from the study option was available at one's convenience. The participants could withdraw from the study at any time by sending me an email.

Protecting the rights and privacy of research participants is paramount in amassing, storing, and analyzing participants' data (Bloom, Ganley, & Winker, 2014). To ensure confidentiality and discretion, I used the pseudonyms Participants 1 through 6 to identify participants. I will store electronically executed Participation Consent Forms, recorded interviews, and researcher's interpretation data in a tamper-proof safe and on a personal password-protected external hard drive for a minimum of 5 years, ensuring the rights of the participants and that their identity remains confidential. After the 5-year threshold, I will shred all hard copies of the executed Participant Consent Forms and recorded interview data. I will destroy all electronic information by redacting the data and ablaze the password-word protected external hard drive.

Data Collection Instruments

I was the principal data collection instrument for this case study. My role was to collect the data for this qualitative multiple case study using evidentiary sources. Some of the evidentiary sources used by qualitative researchers to gather data include archival records, documentation, direct observations, participant observation, physical artifacts, and interviews (Austin & Sutton, 2014; Yazan, 2015; Yin, 2017). Yin (2017) argued case study researchers need to collect their data from multiple sources to capture the complexity and entirety of the case under study. Multiple evidentiary data collection instruments are useful in enhancing the reliability and validity of the collected data (Yazan, 2015) to maximize the quality of the case study (Yin, 2017). Yin posited multiple sources of evidence could be beneficial when conducting an in-depth exploration of the understanding of an event or phenomenon. During data collection, researchers should exhibit qualities of sensitivity, responsiveness, and flexibility to achieve an understanding and meaning of the collected data (Denzin, 2014; Marshall & Rossman, 2016). I used an interview protocol and organizational artifacts (annual reports and websites) to explore strategies some human resource managers use to retain talent during downsizing.

Structured, unstructured, and semistructured are three types of qualitative interview techniques (Austin & Sutton, 2014; Yin, 2017). A structured interview approach was not fitting for the current case study because I did not depend on a set of predetermined questions framed algorithmically to guide this case study. Likewise, an unstructured interview approach was not appropriate for this case study because neither the questions nor the response categories were predetermined. However, a semistructured interview approach was suitable for collecting data for this case study. Austin and Sutton (2014) argued semistructured interviews might begin with some defined questions, but a researcher has considerable latitude to modify questions to the specific direction of responses, allowing for more spontaneous and natural conversations between the researcher and the participant. Researchers also use the semistructured interview approach to ask follow-up and probing questions to gain a deeper understanding of the phenomenon (McGuirk & O'Neill, 2016). I employed a semistructured interview approach using a set of defined questions that allowed for follow-up and probing questions to obtain an understanding of the strategies some human resource managers use to retain talent during downsizing.

The goal of qualitative researchers is to gather information from research participants to gain a deep understanding of a phenomenon (Wilkerson, Iantaffi, Grey, Bockting, & Rosser, 2014). Face-to-face interviews are beneficial when a researcher is seeking rich and thick data that can provide an understanding of participants' experiences (Peters & Halcomb, 2015). A face-to-face interview is also useful when a researcher seeks the opportunity to clarify questions arising from vague or nonverbal responses (McGuirk & O'Neill, 2016). I conducted a face-to-face interview using semistructured interview questions and an interview protocol to engage with each participant and obtain the most feedback and understanding about the strategies some human resource managers use to retain talented employees during downsizing.

An interview protocol is a set of rules and guidelines used to guide for conducting interviews (Dikko, 2016). An interview protocol is useful for consistency and standardization when conducting interviews and producing data. The interview protocol for this case study consisted of pre- and postinterview guidelines and nine open-ended interview questions. When performing as a research instrument, qualitative researchers tend to construct open-ended, study-specific interview questions (Castillo-Montoya, 2016). Open-ended questions are an information-gathering technique used to encourage participants to formulate meaningful and interpretable responses using their knowledge and feelings about a phenomenon (Züll, 2016). Open-ended questions are useful because the questions do not coerce participants' answers (Schonlau & Couper, 2016), thus yielding more reliable and valid data (Züll, 2016). Boyce and Neale (2006) suggested the number of open-ended questions for a research study should be limited to 15. Researchers also use open-ended questions to generate thick and rich data and to seek additional data not available when using closed questions (Popping, 2015). Open-ended questions are appropriate for enhancing the reliability of interview protocols (Züll, 2016) and the quality of data gathered from research participants (Yin, 2017). For the current case study, I used open-ended questions to gather meaningful and interpretable responses from six human resource managers who have successfully used their strategies to retain talent during downsizing.

From a qualitative perspective, reliability ensures the quality and consistency of data interpretations, whereas validity is a consequence of the reliability of the study (Noble & Smith, 2015). Upon the commencement of each actual interview, I captured each participant interview using an Apple I-pad audio voice recorder application along with an ASUS audio voice recorder application for reinforcement. Using these voice and audio recorders confirmed my interpretation and recollection of participants' responses were accurate. After performing response verification, I performed member checking to validate the transcribed information.

Member checking is useful for improving the reliability and the validity of a study (Harvey, 2015). Member checking is a valuation process that commences immediately after each interview to enrich the reliability and validity (Elo et al., 2014) and the trustworthiness of the collected data (Harvey, 2015). To determine the trustworthiness of a study, researchers use member checking to confirm researchers' interpretations to each participant and verify the accuracy of the data and completeness of the findings to improve the validity of a study (Harvey, 2015; Thomas, 2016).

Qualitative researchers also use triangulation to validate multiple sources of evidence (Carter, Bryant-Lukosius, DiCenso, Blythe, & Neville, 2014). Triangulation helps a researcher to cross-examine the integrity of participants' responses (Anney, 2014). I used methodological triangulation to strengthen the quality, reliability, and validity of the data. Methodological triangulation is a suitable technique for correlating data from multiple data collection methods (Fusch & Ness, 2015). After each interview, I amassed organizational artifacts (the annual reports and websites) from information outlets as a line of inquiry. Subsequently, I conducted member checking. I triangulated participants' responses, the annual reports, and corporate websites to strengthen reliability and ensure data findings were valid.

Data Collection Technique

Qualitative researchers gather raw data using the techniques of interviews, observation, diaries, written documents, or a combination of diverse methods (Elo et al., 2014). Recorded interviews (Morse, 2015) and corporate documentation (De Massis & Kotlar, 2014) were the data collection techniques of the current multiple case study. I scheduled and conducted face-to-face, semistructured interviews following the interview protocol and amicable interview parameters (date, time, and location). Conducting interviews in a tranquil location allow participants to share their strategies and capabilities about the phenomenon (Sarma, 2015). A semistructured interview allows for a natural encounter between the researcher and each participant when the researcher is seeking in-depth raw data (Cairney & St. Denny, 2015). Conversely, performing a semistructured interview can be costly and limit the scope of participants because of the small geographical scale and setting of a case study (Irvine, 2011). A semistructured interview can also heighten intensity where topics are sensitive (Irvine, 2011; Sturges & Hanrahan, 2004).

To schedule amicable interview parameters, I contacted each participant electronically to schedule a telephone call to discuss the reason for the study and their willingness to participate in the current case study. During our telephone conversation, I established a suitable date, time, and location for conducting the interview. Before the scheduled interview date, I provided each participant with a reminder and confirmation in an electronic format. I allotted an hour for each interview.

At the interview site, I welcomed and thanked each participant for partaking in this case study. I provided each of the participants with a copy of their Participant Consent Form for discussion and review before the beginning of the interview. I discussed the intention of this interview and the retention of collected data consistent with Walden IRB guidelines.

The data collection techniques and interview protocol of Rubin and Rubin (2012) and Turner (2010) guided this case study. Rubin and Rubin stated, *responsive interviewing* allows researchers to ask participants open-ended, follow-up, and probing questions to obtain a deep understanding of the phenomenon. Face-to-face interviews are useful when a researcher seeks rich data that may provide an understanding of the participants' experiences (Peters & Halcomb, 2015). A face-to-face interview is also useful for allowing a researcher the opportunity to clarify questions arising from vague or nonverbal responses (McGuirk & O'Neill, 2016). Asking additional interview questions is beneficial in achieving data saturation (Unertl, Field, Price, & Peterson, 2015). I used an interview protocol to guide the interview process for this case study.

Turner (2010) posited a researcher should use an interview protocol to (a) monitor the recorder devices, (b) present only one question at a time, (c) deliver an unbiased reaction to question responses when notetaking, (d) provide a smooth transition between question and responses, and (e) maintain control and time management of the interview process for data interpretation. Immediately following each interview, I reviewed organizational artifacts (annual reports and corporate websites) of each of the service industry corporations.

There are several advantages and disadvantages to conducting a face-to-face interview in qualitative case study research. Edwards and Holland (2014) stated that one of the advantages of performing a face-to-face interview is the interactional exchange of dialogue between a researcher and two or more participants in a face-to-face setting. Another advantage of conducting a face-to-face interview is that researchers can probe an initial response to an interview question deeper when inconsistencies arise to gain understanding (McGuirk & O'Neill, 2016). Yin (2016) underscored that one of the disadvantages of performing a face-to-face interview is the potential for researcher bias, thus influencing and producing erroneous findings of a study. Another disadvantage of conducting a face-to-face interview is that research participants may be reluctant to answer interview questions truthfully (Smith & Noble, 2014).

Smith and Noble (2014) emphasized researchers have an ethical duty to outline the limitations of study and account for potential sources of bias. Researchers can use member checking to mitigate potential sources of researcher bias. Member checking is a technique used by researchers to analyze the recorded information for accuracy (Thomas, 2016). According to Morse (2015), the member-checking process consists of (a) collecting the interview data, (b) transcribing the data, (c) interpreting the data, and (d) providing a synopsis of the data for participant authentication. Researchers can also use member checking to improve the credibility and dependability of a study (McInnes, Peters, Bonney, & Halcomb, 2017). Therefore, I used member checking to diminish researcher bias and increase creditability and dependability, thus the trustworthiness of this case study.

Semistructured interviews and organizational artifacts (annual reports and websites) are the data collection techniques for the current case study. Qualitative researchers tend to use open-ended, study-specific interview questions (Castillo-Montoya, 2016) to encourage each participant to contribute and interact with the primary instrument with minimum limitations (Cairney & St. Denny, 2015). Qualitative researchers use corporate documentation (organizational artifacts) to extend their understanding relevant to the phenomenon (Merriam & Tisdell, 2016). Researchers use semistructured interviews and corporate documentation (organizational artifacts) to collect thick and rich data and probe deeper when inconsistencies arise to gain an understanding (McGuirk & O’Neill, 2016). Semistructured interviews and organizational artifacts are suitable data collection instruments. I used these sources of evidence to explore strategies some human resource leaders use to retain talent during downsizing.

Data Organization Technique

Case study researchers can collect raw data using multiple means of qualitative sources (De Massis & Kotlar, 2014). I employed the qualitative sources of interviewing and reviewing artifacts to collect the data for this multiple case study. Both interviewing and documentation are forms of inquiry that can contribute to the understanding of a phenomenon (De Massis & Kotlar, 2014). Each participant interview was recorded using an Apple I-pad audio voice recorder application along with an ASUS audio voice recorder application for reinforcement. The audio voice recorder provides simple design and ease of use (Keifer, Reyes, Liebman, & Juarez-Carrillo, 2014). Before commencing each interview, I tested both recording devices for operational use and obtained a verbal and written authorization from each participant to conduct the interview. Immediately after each recorded interview, I obtained pertinent organizational artifacts for evaluation.

To conceal the identity and maintain the confidentiality and ambiguity of each participant, I performed the method of coding. I assigned each participant a unique alphanumeric identification code of Participant 1 through Participant 6. I created a case study database and an electronic codebook to organize and document the collected data to gain an emerging understanding of the phenomenon. A case study database delineates the trajectory of the data collected, while a codebook defines the codes, definitions, and examples used to analyze interview data (DeMassis, & Kotlar, 2014).

In the current study, recorded interview data and written documents were electronically stored in the database. I entered data source information collected into NVivo 12 for Windows® software for coding to capture themes and patterns. Data source information collected will be stored in compliance with IRB criteria. As the approved researcher, I have exclusive rights to all collected data. To protect the privacy and maintain confidentiality, I stored electronic data sources on a personal, password-protected, external hard drive and hard-copy data in a tamper-proof safe for shredding after 5 years.

Data Analysis

Qualitative case study researchers can triangulate data from multiple sources such as documentation, interviews, direct observation, participant observation, and physical artifacts to reach a holistic understanding of the phenomenon to be studied (Baškarada, 2014). Houghton, Casey, Shaw, and Murphy (2013) denoted that triangulation is a powerful technique used to validate the data through cross-verification using multiple data sources for the investigation to produce an understanding of a phenomenon. I selected methodological triangulation to enhance understanding of the studied phenomenon. Researchers use methodological triangulation to converge information from various data sources to corroborate the findings of the research (Carter et al., 2014). Semistructured interviews are useful for collecting data to explore meanings and inferences within a study (Yin, 2017). As a part of the interview protocol, each participant was asked to respond to semistructured interview questions. These semistructured interview questions align with the overarching research question: What strategies do some human resource leaders use to retain talented employees during downsizing?

To complement the interview protocol, I examined organizational artifacts—the annual report and website. The annual report is a publication that a public company uses to disclose company information to their shareholders (Belal, Abdelsalam, & Nizamee, 2015). The annual report is the best source of information for most individuals to determine the operations and financial health of a company (Uwuigbe, Olugbenga, Uwuigbe, Peter, & Adegbola, 2017). The report includes (a) a letter from the CEO, (b) a business profile, (c) a management analysis, and (d) financial data required to be posted on the corporate website.

A corporate website is a network offering financial and corporate business communication to stakeholders such as investors, shareholders, employees, customers, job seekers, and providers (Agrebi & Boncori, 2017). The corporate website's content generally offers five subject matter: (a) financial communication, (b) company policy and strategy, (c) the management of public relationships, (d) human resources, and (e) the social life of the company (Agrebi, 2013). I obtained these artifacts, as supplementary data, through a Google search of each participant's service industry corporation. I augmented collected data to present quality evidence unable to be obtained using a single source. Using methodological triangulation, the researcher can augment data by using multiple sources as tangible evidence (Yin, 2017). I used semistructured interview data and organizational artifacts to triangulate and obtain the thickness and richness of the data and develop rigor toward achieving data saturation.

Robert Yin’s (2017) five analytic technique is an appropriate method for analyzing qualitative multiple case study. The sequence of Yin’s analytic technique consists of (a) compiling the data, (b) disassembling the data or coding, (c) reassembling the data, (d) interpreting the meaning of the data, and (e) concluding the data. I selected NVivo12 for Windows® software by QSR International as the qualitative data analysis tool for this case study. NVivo12 for Windows® software analyzes data and imports textual interview data into NVivo11 from Microsoft Word (Sotiriadou, Brouwers, & Le, 2014). The first analytic phase involves compiling to organize the data (Yin, 2016). The second phase is the disassembling of the data or coding (Yin, 2016). Coding involves segmenting raw data to isolate recurring words, statements, and key themes into categories or classifications that represent common thoughts (Elo et al., 2014). The coding of data also implicates match keyword searches needed for the downstream computer-assisted analysis to identify meaningful patterns and themes (Pierre & Jackson, 2014). To identify similarities and prevalent themes, I used the NVivo12® software auto-coding feature. This feature segmented and clustered consistencies among the viewpoints of each participant to address the overarching research question.

After disassembling the data, reassembling, the third analytic phase, commences. Reassembling the data entails continuous consideration of the data until emerging themes are acceptable/suitable (Yin, 2016). The fourth phase involves interpreting the meaning of the data (Yin, 2016). Interpreting the data allows researchers to offer their meanings to the reassembled data (Yin, 2016). My ability to comprehend reassembled data was critical to the data findings. The final analytic phase is concluding the data analysis process (Yin, 2016). Concluding, I denoted the findings of this case study using the participants' interview statements to develop themes and patterns derived from the central research question. Themes and patterns are the foundations for understanding the findings of a qualitative research study (Yin, 2016).

NVivo 12 for Windows® software can be in a broad-based workspace to accommodate every stage of the research study (Zamawe, 2015). Upon initiation, NVivo 12 for Windows® automatically can upload several file types such as Microsoft Word documents, audio files, and spreadsheets (Sotiriadou et al., 2014). The NVivo 12 for Windows® software also contains a feature that enables the user to provide an interchangeable migration among other applications such as Microsoft programs and other reference application (Sotiriadou et al., 2014). NVivo 12 for Windows® identifies themes and meanings necessary for the findings of this case study. NVivo 12 for Windows® assigned codes to words and phrases relevant to the collected data. Using NVivo 12 for Windows® allowed me to input, store, code, and compare the participants' data for the current study. NVivo 12 for Windows® software aligns the collected data by increasing the rigor of a research study (Zamawe, 2015). This qualitative data analysis has strategies some human resource leaders used to retain talent during downsizing.

The conceptual framework is the catalyst that connects the literature methodology and the results of a study (Borrego, Foster, & Froyd, 2014). Researchers use a conceptual framework to explain, predict, or present a broader understanding of the phenomenon of interest or research problem (Imenda, 2014). I analyzed the collected data using the social factors of the institutional theory of downsizing developed by McKinley et al. (1995) to answer the overarching research question.

Reliability and Validity

Qualitative researchers use various strategies to achieve reliability and validity (Marshall & Rossman, 2016; Noble & Smith, 2015). In qualitative research, reliability is firm when the collected data are reliable and may duplicate in various environments (Birt, Scott, Cavers, Campbell, & Walter, 2016). Likewise, validity is firm when the consistency and dependability of the study findings reflect the phenomenon explored (Patton, 2015). Yin (2017) stated that construct validity, internal validity, external validity, and reliability are characteristics researchers use to judge the quality of the research design. Whereas, dependability, credibility, transferability, and confirmability are approaches researchers use to authenticate the reliability and validity of a study (Connor, Mott, Green, Larson, & Hickey, 2016). Researchers also use reliability and validity to increase transparency and decrease researcher bias (R. Singh, 2014). A researcher should use a detailed data collection protocol to ensure gathering accuracy and protect the data from external and internal threats (Yin, 2016). To analyze the rigor, reliability, and validity of a research study, the findings of the study need to be (a) considered credible, (b) transferable to similar circumstances, (c) deemed dependable, and (d) confirmable during the alignment of data findings and recommendations (Denzin, 2014). Reliability and validity are vital to the trustworthiness of the current multiple case study.

Reliability

In qualitative research, reliability refers to the consistency, dependability, and replicability of a research finding (Leung, 2015). Reliability occurs when a researcher can follow and replicate research findings to draw the same conclusion (Morse, 2015). To ensure the reliability of the case study, I adhered to the following plan: (a) collect the data; (b) conduct data analysis; and (c) engage in data interpretation using the interview protocol, member checking, and methodological triangulation. Researchers use an interview protocol to ensure consistency when asking interview questions (Cairney & St. Denny, 2015) and to remain unbiased (Anney, 2014) during an interview session. At the conclusion of an interview protocol, a researcher can use member checking to confirm each participant's consistencies and accuracies of collected data during the collection phase of a study (Thomas, 2016). From a qualitative reliability perspective, triangulation is an approach used by researchers to yield more comprehensive research findings using different methods and perspectives (Noble & Smith, 2015). Researchers use the methodological triangulation approach to triangulate multiple sources of evidence, such as interviews, participant observation, and documentation, to augment the reliability of the findings (Carter et al., 2014). This strategy ensures that the reliability of this study enhances the dependability of the study.

Dependability aligns with reliability (Baskerville, Kaul, & Storey, 2017). Dependability refers to the reliability and trustworthiness of documented research that allows someone outside to audit and review the research process (Kihn & Ihantola, 2015). Dependability, as a chain of custody, provides transparency and increases the reliability of data (Yin, 2017). To reinforce the dependability of the data, I used an audio-voice recording to record participants' responses, textually record their responses, and return recorded responses to participants as a form of member checking to ensure the data captured were correct.

Validity

In qualitative research, validity refers to the consistency and trustworthiness of the collected data, as signified by the research findings (Cypress, 2017). Credibility, conformability, and transferability are terms that researchers use to present the trustworthiness of qualitative content analysis (Russell, 2014). Validity is a consequence of reliability (Noble & Smith, 2015). Validity is useful for confirming the accuracy of the findings, whereas the dependability and consistency of the collected data influence the outcome of reliability (Wickham, Reed, & Williamson, 2015). Qualitative researchers use credibility, conformability, and transferability to increase the usefulness and trustworthiness of the research findings (Cope, 2014; Moon, Brewer, Januchowski-Hartley, Adams, & Blackman, 2016). Trustworthiness is a criterion for evaluating the characteristics of qualitative research findings (Baillie, 2015). The strategy of credibility, conformability, and transferability increased the validity of the current case study to enhance the trustworthiness of this study.

Credibility. Credibility refers to the believability of the research findings (Appelman & Sundar, 2016). Anney (2014) posited a researcher could establish the rigor of the inquiry by using credibility strategies to determine whether the research findings represent participants' original data and that the interpretation of the participants' original views is correct. Useful approaches to establishing creditability are methodological triangulation, peer debriefing, and member checking (Moon et al., 2016). I used methodological triangulation and member checking to demonstrate the credibility of the current case study.

Confirmability. Confirmability refers to objectivity that the accuracy, relevance, or meaning of the collected data can be followed and, as a process, replicated by other researchers (Moon et al., 2016). Confirmability denotes the neutrality and accuracy of the collected data so that another individual can logically follow the conclusion of a study (Anney, 2014). Hadi and Closs (2016) suggested an audit trail and reflexive journal suitable methods for providing confirmability. NVivo 12 for Windows® is a useful software for managing an audit trail of all research decisions and activities related to how the data were collected, recorded, and analyzed (Houghton et al., 2013). I used NVivo 12 for Windows® to demonstrate the confirmability of the data and interpretations of the findings during the research process.

Transferability. Transferability refers to whether the findings described in one study are transferable and applicable or useful for future research in similar settings, while upholding the meanings and inferences of the completed research study (Moon et al., 2016). Researchers use transferability to provide a detailed description of how the questions and participants were purposively selected to facilitate transferability (Bengtsson, 2016). Qualitative researchers present thick descriptions to include accounts of the context, the research methods, and examples of raw data to enhance the transferability of the study (Anney, 2014). I present thick and rich descriptions of the research context and participants' data to augment the transferability of this case study.

Data saturation. Saturation of the data is a criterion for when no additional data are produced, and collection should discontinue (Keen, 2016). The concept of data saturation is crucial when contemplating sample size decisions in qualitative research (Guetterman, 2015). Researchers should select a suitable sample size of the population based on the similarity and differences of the individuals addressing the research question (Elo et al., 2014).

Selecting the right sample size of the participants provide a researcher with the best opportunity for achieving data saturation (Fusch & Ness, 2015). Data saturation occurs when the collected data contain no new themes, insights, perspectives, and information and is sufficient to replicate the study (Guetterman, 2016). M. E. Hancock, Amankwaa, Revell, and Mueller (2016) posited a researcher achieves data saturation when collected data remain consistent, and no new or relevant data emerge. Using an interview protocol, I interviewed two human resource leaders from three different retailers for a total of six participants for the best opportunity to obtain thick and rich quality data for achieving data saturation.

When researchers fail to achieve data saturation with participants' responses, their failure compromises the quality and validity of the research (Fusch & Ness, 2015). I achieved data saturation. I collected data by interviewing the selected six human resource leaders who had successfully used their strategies to retain talented employees during downsizing. Subsequently, I conducted member checking and reviewed organizational artifacts until the data were saturated. Once I achieved data saturation, I demonstrated the trustworthiness of this multiple case study using the methods for evidence of credibility, dependability, conformability, and transferability of the current case study findings.

Transition and Summary

The purpose of the qualitative multiple case study was to explore strategies some human resource leaders can use to retain talent during downsizing. To explore and understand downsizing strategies, I used Yin's (2016) five-step data analysis process: (a) compiling, (b) disassembling, (c) reassembling, (d) interpreting, and (e) concluding. I utilized semistructured interviews to collect the data and discover strategies and personal perceptions of each participant. I triangulated the data using the annual report and website of each participant's corporation. I used purposive sampling to obtain six human resource managers in the service industry in Atlanta, Georgia, who had experience in retaining talent during downsizing.

Before collecting data, I obtained authorization from Walden University's IRB to commence research. I conducted recorded face-to-face interviews and recorded interview data verbatim. Once recorded, I shared my interpretation of the interview data with each participant using member checking to affirm the accuracy of the data. I uploaded the textual interview data to NVivo 12 qualitative software to identify and analyze emerging patterns and themes within the study. Section 3 of this study includes the findings of this study and the following subsections: introduction, presentation of findings, application to professional practice, implications for social change, recommendations for action, recommendations for further research, reflections, and conclusion.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of the current qualitative multiple case study was to explore strategies human resource managers use to retain talented employees during downsizing. The study's participants consisted of six human resource leaders from three Fortune 500 service industry corporations who have operations based in metropolitan Atlanta, Georgia. Each of the study's participants had more than 5 years of experience in human resource or talent management and had successfully used their talent management retention strategies to retain talented employees during downsizing. With unemployment at 10% in 2010 and remaining at 5% in 2016 (Nichols, Schmidt, & Sevak, 2017), employee separation remains high, and talent is scarce. This study was needed because of the significant number of talented employees being displaced during downsizing. The conceptual framework guiding this case study was the institutional theory of downsizing (see McKinley et al., 1995).

I conducted six face-to-face semistructured interviews with human resource leaders who had effectively used strategies to retain talented employees during downsizing. I used the interview protocol to guide the interview process. As a part of the interview protocol, each participant reviewed and signed the consent form before the interview commenced. Each participant responded to nine open-ended questions. I reviewed other sources of data, such as the annual report and corporate website, of each of the service industry corporations as addenda to the interview data. To protect the identity of each participant and the confidentiality of the data they provided, I used pseudonyms (P1-P6). In the subsequent sections, I present the findings, applications to professional practice, implications for social change, recommendations for action, recommendations for further study, reflections, and the conclusion.

Presentation of the Findings

The purpose of this multiple case study was to answer the research question: What strategies do some human resource managers use to retain talented employees during downsizing? To answer this question, I used semistructured interview questions and other sources of data, such as the annual report and corporate website, from each organization to collect information and to gain an in-depth understanding of the strategies six human resource leaders use to retain talented employees during downsizing. Each human resource leader responded to nine open-ended interview questions. In my role as the principal data collection instrument, I recorded each participant's responses to the interview questions related to strategies human resource leaders use to retain talented employees during downsizing. Additionally, I used an interview protocol to ensure consistency in the interview process.

After each interview, I transcribed the responses and performed member checking by emailing each participant my summary and interpretation of their interview. I interpreted each participant's responses accurately the first time. After completing member checking and reviewing each annual report and corporate website, I used Yin's (2016) five analytic techniques to analyze the data and imported relevant data into NVivo Pro12 for coding to capture themes and patterns. After the imported data were analyzed, I used NVivo Pro12 to identify three central themes: (a) transparent communication, (b) performance management, and (c) succession planning. I used those themes to discuss how the participants' responses to the interview questions correlated with the literature review findings and the conceptual framework—McKinley et al.'s (1995) institutional theory of downsizing. The participants provided consistent responses to the interview questions in conjunction with the literature review findings and conceptual framework.

Methodological triangulation led to the identification of three themes that helped me describe how human resource managers successfully retain talented employees during downsizing. I also reviewed the annual reports and corporate websites to confirm, disconfirm, or extend knowledge of the interview data and tie the findings to the conceptual framework. The findings revealed strategies human resource managers use to retain talented employees during downsizing. My review of the professional academic literature revealed 10 themes, and the findings of this case study indicated that the three central themes were consistent with five literature review themes: (a) downsizing management, (b) downsizing strategies, (c) role of human resource managers, (d) talent management, and (e) best practices for talent retention.

Recent research (Kichuk, Brown, & Ladkin, 2019; Sawaneh & Kamara, 2019; D. Singh, 2019) confirms the findings of the current study that transparent communication, performance management, and succession planning are business practices some human resource managers use to develop and implement useful strategies to retain talented employees during downsizing. The three themes of transparent communication, performance management, and succession planning, when adopted by business leaders and human resource managers, could be beneficial in retaining talented employees during downsizing. Table 1 contains the number and percentage of frequency of themes.

Table 1

Frequency of Themes for Talent Retention Strategies Used During Downsizing

Theme	*n*	% of frequency occurrence
Transparent communication	45	33.6
Performance management	36	26.8
Succession planning	53	39.6

Theme 1: Transparent Communication

Managing communication is a significant element of the downsizing process in a workplace environment. Transparent communication underpins the literature themes of downsizing strategy: contemporary workforce downsizing practice and the role of human resource managers when commencing a downsizing event. Cloutier, Felusiak, Hill, and Pemberton-Jones (2015) and Gandolfi (2013) suggested there should be straightforward and transparent communication between leaders, managers, and employees about the reason for employment downsizing. Cloutier et al. suggested that business leaders and human resource managers should establish a proficient communication process that connects employees to the right message from the employer.

In the current case study, five of the six participants confirmed transparent communication as an integral part of the downsizing process. P1 and P3 explained the importance of open communication in the planning and implementation of employee downsizing. P1 stated, “As soon as business reasons for downsizing have been established, business leaders must effectively create a communication plan and work with human resources to discuss downsizing activities and how to retain talented employees." P3 asserted,

> Immediately after executive and business leaders make the business decision to downsize their current workforce, it is prudent that I communicate the right message and/or information to my respective HR manager to convey to each employee in my business unit.

Cloutier et al. (2015) also posited an active channel of transparent communication among managers and employees would help maintain a healthy work culture. P6 affirmed that although the information is not pleasant, employees must hear the information directly and honestly from their respective managers, not from the other sources such as rumor mills. P2 added that during a downsizing event, the human resource strategy of open communication and transparency can have a substantial effect on managers and talented employees' interactions.

P1, P2, P3, and P6 made statements that were consistent with the findings of Bayardo et al. (2013) who indicated that communication could act as an intermediary during downsizing. P5 considered honest communication as one of the critical elements in managing change and retaining talented employees. P5 further emphasized having the manager meet one-on-one with each employee being impacted prior to the public notification to share performance appreciation and minimize the negative perception and perceived partiality of the downsizing process. P1, P2, P3, P5, and P6 also stressed that respective managers should provide the remaining employees with the rationale for the downsizing and report any changes in job responsibilities and reporting relationships to alleviate the concerns of talented employees. P2 stated, “Conducting a one-on-one open and transparent conversation with a talented employee provides us with information about how each employee is thinking and feeling about the layoffs and the direction of the organization after changing business goals.” Additionally, P1 asserted, “Not providing open and transparent communication channels can result in the spreading of misinformation and unnecessary rumormongering.”

In contrast, P4 disconfirmed transparent communication as an integral part of the downsizing process. P4 identified transparent communication as a barrier when implementing a downsizing event. P4 stated, “Open and transparent communication, if not delivered and received correctly, especially in a one-on-one, could create an unhealthy work environment.” P4 also implied the best format for communication is either a series of meetings with the whole unit or meeting with smaller workgroups followed by individual meetings with employees.

Appelbaum et al. (2015) posited that how management communicates information concerning the reorganization of human capital, the implementation of this process, and the possibility of using alternative downsizing methods and strategies may lead to successful employment downsizing. Cohee (2019) confirmed that human resource managers must provide transparent, candid, and inclusive communications to leaders and managers relating to a downsizing rationale. P5 and P6 implied that transparent communication between leaders and human resources managers could moderate the internal and external barriers that may hinder the implementation of effective talent retention strategies. P5 stated,

> Our organization addressed internal and external barriers by scrubbing the data between assigned committees composed of senior team members from various functional areas. These committee teams reported to Executive Vice President who challenged their thinking and decision-making process. Human resource managers were assigned and partnered with an EVP. Summation reports were gathered and present to all EVPs to ensure consistency and retention of top-level employees.

P6 asserted, "Different levels of leadership from various geographical locations collaborated with human resource managers to reduce internal and external barriers." D. Singh (2019) and Taha and Esenyel (2019) stressed that effective communication is vital; to maintain a healthy workplace environment, leaders and managers must be able to operate in an interpersonal, group, organizational, and intercultural environment that is respectful.

To achieve methodological triangulation, I reviewed the interview data, three annual reports, and three corporate websites of service retailers who employed the six participants of the current case study. Two of the annual reports and one corporate website extended knowledge about transparent communication. The annual report for P1 and P4 disclosed the development of a plan to decrease the complexity of the executive management structure to enhance the decision-making and reduce costs associated with the restructuring activities and to record severance and other human resource-related costs. The published annual reports for P2 and P5 contained this statement: “Inspire human process through the power of communication and entertainment.” The corporate website for P3 and P6 contained this text: “We have expanded our stakeholder engagement process to allow our material topics to reflect ongoing stakeholder dialogue throughout the year.” These annual reports and the corporate website had executives’ insights consistent with the responses of all six participants that talent management strategies of open communication and transparency have a substantial effect on managers and talented employees’ interaction during an organizational event like downsizing. The consistency of the collected data supported the theme of transparent communication. The findings of this study confirmed that meaningful discussions and transparent communication between business leaders and human resource managers, managers, and employees are paramount for the retention of talented employees, particularly during a downsizing phenomenon.

Theme 2: Performance Management

Performance management is a process of communication in which an employee’s performance is regularly evaluated by his or her manager in a formalized review process. Armstrong and Taylor (2014) implied that performance standards assessments should be quantitative, time-bound, realistic, and job-related so that the standard is encapsulated in the critical performance dimensions of an employee’s job performance. The literature themes of the role of human resource managers, downsizing management, talent management, and best practices for talent retention support the case study theme of performance management when evaluating and identifying talented employees during a downsizing event. The findings of DeNisi and Murphy (2017) and Gladisa and Susanty (2018) were consistent are the findings of Brymer et al. (2014) who asserted that managers must consider effective methods for measuring employees' skill sets and abilities. DeNisi and Murphy emphasized that business leaders and human resource managers should measure the effectiveness of talented employees using an annual performance appraisal. Likewise, Gladisa and Susanty highlighted that when measuring job effectiveness, most organizations focus on key business objectives and individual performance goals, which are assessed using key performance indicators.

All six participants in the current case study confirmed that performance management appraisals play a strategic role in identifying talented employees to retain during a downsizing event. These appraisals reveal critical information about an employee's work performance. P1 and P3 conceded that all managers were required to conduct an annual performance appraisal. P1 asserted that their organization uses performance appraisals to rate an employee's performance against standard performance criteria that align with the goals and objectives of the employee and the organization. P3 stated, "We use performance appraisal to rate, reward, and identify talented employees and poor performers." P6 affirmed that organizations measure the effectiveness of talented employees through performance appraisal interviews. P4 explained that an annual review is conducted to ensure that both the employee and the manager have a clear understanding of the employee's goals and the manager's performance expectations and that both are aligned with organization's objectives.

Subekti and Setyadi (2016) confirmed the use of key performance indicators, skills evaluations like the 360-degree feedback model, management by objectives, and SMART Goals effective measurements for employee performance during downsizing. P5 affirmed raters should provide human resource managers with the behavior, skill sets, and measurement used to evaluate each talented employee. P6 stated,

> Performance standards were assigned by 1, 2, and 3 ratings on two sides. One side was how did the talent measure the values of the organization. On the other side, the talent was measured on how well they perform towards their objectives over the past 3 years. Therefore, a person could end up with a 1,1, a 1,2, a 1,3, a 2,1, a 2,2, a 2,3, a 3,1, a 3,2, or a 3,3. As a result, my organization would have nine different boxes of performance. My organization utilizes this quantitative rater to minimize the qualitative input to ensure that leadership biases are not inappropriately put in place.

Freeman (2013) posited human resource managers must know the skill level of employees to avoid ambiguities about their capabilities when evaluating an employee for retention or downsizing. Business leaders and human resource managers should have the opportunity to work together to discuss the organization’s expectations, the long-term objectives, goals set by the organization, and how an employee retention strategy will affect an employee who has not met these expectations and objectives in the matter of a downsizing notice.

Yu et al. (2013) asserted human resource managers could eliminate positions to strategically position the organization with the right level of talented employees. P5 stated,

> Our organization has defined a talent performance program that measures how talent performed in the top 10%, middle 70%, and bottom 20%. For people who perform in the bottom 20% for more than 2 consecutive years, we put performance improvement plans in place. These performance improvement plans are designed to mitigate any issues that are preventing individuals from achieving a higher level of performance. Individuals on performance improvement plans are the first considered to be downsized.

P2 considered the last performance appraisal to be the rater for retaining talented employees during downsizing—effective employee retention strategy.

Intrinsically, to conduct and reach the methodological triangulation, I used the interview data of the six participants to evaluate the effectiveness of talented employee's performance appraisals. I reviewed and sought information about employee performance maxims using the annual reports and corporate websites of service retailers who employed each participant. The service retailer's website of P1 and P4 maxim stated, "Every job matters and each of us plays a unique part in our company's success." The maxims of P3 and P6 were "We are clear and accountable to the responsibilities of our roles," and "We seize every opportunity to make our team successful." P2 and P5 company's website maxim disclosed, "Employees may be held accountable for actions, on or off the job, that could impair work performance or affect the company's reputation or business interests." These annual reports and the corporate websites extended knowledge in relation to the responses of the participants that an employee's performance appraisal can have a significant effect on the retention of talented employees during an organizational event, like downsizing.

The consistency of the data gathered supports the theme of performance management. The findings of the current study confirm those of Sawaneh and Kamara (2019) that in order to successfully conduct performance management during downsizing, human resources managers must develop and implement a strategic performance-based system that is equitable using both performance appraisals and a manager's feedback to identify employees for dismissal and talented employees for retention (i.e., those whose competencies align with the organizational strategy).

Theme: 3 Succession Planning

During downsizing, organizations experience an increase in talent volatility. Therefore, business leaders must strategically analyze, restructure, and deploy employees continuously (Galeazzo et al., 2017). Succession planning buttresses the literature themes of downsizing strategies, talent management, and best practices for talent management when identifying talented employees for retention to decrease talent volatility during a downsizing event. Amid an organizational phenomenon, like downsizing, the literature of Donohue and Tham (2019) is consistent with my initial literature review of Rao (2015), who suggested human resource planning is necessary for an organization to succeed in the 21st century. Donohue and Tham implied succession planning is a critical human resources management practice that human resource managers must incorporate as a strategy for retaining talented employees into an organization's downsizing strategy. All the participants of the study confirmed succession planning offers a blueprint for growth and retention that is vital to the prolonged existence of any organization.

Since the initial gathering of literature relevant to succession planning, I found the recent research of Ahsan (2018), who confirmed succession planning is a systematic strategy used by human resource managers to determine levels of employees needed to establish a successful replacement plan in case of an unexpected loss of employees. P1 and P2 affirmed succession planning is needed to identify and develop future leaders for your company—at all levels plan. P5 stated, "Succession planning is necessary to ensure organizations are prepared for all contingencies by identifying and training high-potential workers for advancement into key roles." P4 explained, "Some business leaders and human resource managers use succession planning as a talent management tool for promoting talented employees based on the performance of the employee." P4 added, "Because these leaders and managers utilize the planning to promote from within could help retain talented employees amid an organization crisis like a downsizing event." P6 conceded succession plan is a best practice approach used by human resource and talent management managers seeking to retain talented employees who have skills and competencies that can add value to an organization. P6 also supported the statements of P3, who stated, "Succession planning is a deliberate and methodical effort by an organization to ensure scholarship continuity in key positions, employee retention, and the identification of talented pool employees for the future of the organization."

I further found Boštjančič and Slana (2018), who implied succession planning is a process human resource manager use as a strategic framework to identify key positions at various levels, thus creating talent pools for role succession. The current literacy works of Čič and Šarotar-Žižek (2017) is consistent with my initial literature of Samson (2013), who opined some of the challenges confronting business leaders and human resource managers is the inability to create succession plans because of employment instability among the current workforce, which is undergoing a radical transformation into what is known as a multigenerational workforce.

A multigenerational workforce is a workforce made up of employees from different generations who impact the human resource and talent management strategies of an organization in the form of succession planning and talented employee retention (L. F. Lewis & Westcott, 2017). Wiedmer’s (2015) findings are consistent with those of Samson (2013), who posited the demographics of the current workforce represent five generations: (a) Traditionalists, (b) Baby Boomers, (c) Generation X, (d) Millennials, also known as Generation Y, and (e) Gen Z. Categorically speaking, each of the five generations has led to a multifaceted organizational environment and a significant change in the composition of the modern workforce.

In the current case study, five of six participants confirmed business leaders and human resource managers must take a more holistic approach regarding multigenerational workforce and succession planning. P2 and P6 conceded, because of changing demographics of our workforce, business leaders and human resource managers must recognize and capitalize on experiences and skill sets that a multigenerational workforce can contribute to an organization. Tangthong, et al. (2014) posited managers should strategically review human capital market influences to determine what human capital market influences may lead managers to target and organize employment retention initiation as a business strategy. P1 and P3 asserted for organizations to achieve and maintain a competitive advantage, business leaders and human resource managers must be able to identify their most valuable resource—talented employees. P1 stated, “One of the retention criteria used during downsizing is does the employee currently possess the knowledge, skills, and abilities that will fit into the new culture the company is evolving to become?” Additionally, P4 and P5 further stressed business leaders and human resource managers must create communities that practice valuing; recognizing diversity is imperative to maintain a competitive advantage. P4 asserted, “When multiple employees are being considered for employment retention, one of the factors utilized by most business leaders is the employee a high potential in the organization or listed on the current succession plan.”

Since gathering literary works for the review of literature relevant to succession planning, I found the recent research of Rajput, Bhatia, and Malhotra (2019), who confirmed human resources managers must understand the different attributes of each generation in order to retain talented employees. I further found Kosterlitz and Lewis (2017), who extended knowledge that to continue organizational success with strong leadership and employee retention, business leaders and human resource managers must focus on creating a legacy of developing intergenerational succession plans for the future. Kosterlitz and Lewis and Rajput et al. (2019) support the findings of Wiedmer (2015), who found human resource managers must have the ability to identify and retain talented employees and to understand the wealth of institutional wisdom possessed by workers of all generations, which are key talent management strategies needed for creating a successful, talented succession plan during a downsizing phenomenon.

As the workforce becomes increasingly multigenerational, there is a fear in the minds of business leaders about the lack of future business leaders and talented replacements for all levels of employees (Ahsan, 2018). P3 stated, “Business leaders and human resource managers must build a pool of talented employees to support an organization’s succession plan.” Brymer et al. (2014) posited managers must create a talent pipeline as a means for managing an employee’s skills set and abilities.

Since the gathering of literature related to this theme, I found the recent research study of Bolander, Werr, and Asplund (2017), who confirmed an organization whose business leaders and human resource managers create a useful talent pool of multigenerational employees will most likely manage an organizational crisis like downsizing utilizing an effective succession talent management retention plan. P5 commented organizations often make the mistake of focusing on backfilling positions rather than on developing talent management strategies that will deliver a robust talent pipeline of multigenerational talent for employee retention.

Three of the six current participants confirmed business leaders and human resource managers should develop talent management programs like affinity groups to help create a pool of talented employees that supports a multigenerational workforce and succession planning. P4 stated, in response to a multigenerational workforce, “Most firms are creating diversity programs which include affinity groups." P1 indicted, "Affinity groups, also known as networking or resource groups, can add value to a multigenerational workforce succession plan." P5 supported the comments of P1 and P4, who argued that affinity groups could help to prevent marginalization of certain groups of employees and help human resource managers understand the needs of different multigenerational employees.

Since the collecting of literature related to this theme, I found the work of Glassman and Glassman (2017), who posited affinity groups are based on shared interests that bring employees together to share their concerns and address common problems as well as encourage camaraderie and fellowship. In contrast, P2 and P6 disconfirmed and believed the use of affinity groups as a talent management strategy for multigenerational workforce succession planning could lead to disassociation, dissension, and marginalization. Similarly, P3 stated, "Affinity groups may create friction in the workplace because of the use of social media, posting negative inappropriate comments, or sharing others' posts without their permission." Glassman and Glassman affirmed that affinity groups should be voluntary, and employee-guided groups that promote multigenerational and workplace inclusion that align with an organization's best practices for talent management strategy might lead to effective succession management.

However, the research of Rajput et al. (2014) is consistent with the findings of my initial literature review of Samson (2013), who posited some of the challenges confronting human resource and talent managers include the lack of talented human capital and the inability to forecast the labor shortage as a result of Baby Boomers nearing retirement age. Other factors include the incapacity to shift from more general retention programs (e.g., employment ladders and seniority initiatives) to more targeted initiatives, shifting expectations of the new workforce, employment instability among Generations X and Y, and workforce diversity (Samson, 2013). However, the current study participants collectively confirmed (a) understanding the need of a multigenerational workforce is a benefit; (b) providing flexibility, recognizing that one size fits all is not the solution; (c) considering new human resource tools and policy; (d) focus on retaining older workers and reverse mentoring; (e) offer continuous learning opportunities; and (f) rethink growth and development could foster a multigenerational workforce of talented employees to retain during downsizing event.

Although downsizing is known as a “weapon of mass cleansing” (Agwu et al., 2014, p. 4), there are alternative employment strategies to combat the elimination of talented employees. Gandolfi (2013) posited the reduction of employment wages, job sharing, short-term compensation, shortened work weeks, early retirement of seasoned employees, employee furloughs, and voluntary time off are workforce alternatives. However, the six participants of the current study confirmed that to combat the war on downsizing and retain talented employees was to embrace employee mobility through lateral redeployment, internal promotions, and building relationships between Traditional and Baby Boomers and Generation X, Millennials, and Generation Z talent.

P4 explained a downsizing event might affect one or two business units within a business structure. P1 commented,

> Human resource managers should utilize an employee retention strategy like succession plan to research and identify impacted talented employees who may have transferable skill sets that could meet the requirements of unfilled open positions using lateral redeployment and internal promotions to retain some talented employees.

The views of P1 and P4 are consistent with the original literature review findings of both Gounaris and Boukis (2013) and J. I. Hancock et al. (2013), who suggested managers use effective employee retention strategies to retain talent and catapult organizational sustainability. P6 emphasized the use of internal talent pools is a talent management strategy human resource managers use to retain employees being displaced by an organization crisis like downsizing. P2 and P5, in varying words, stated the greatest fear for talented employees is becoming obsolete because of accelerating technological change.

Since the gathering of literary work for the review of literature related to succession planning, I found the work of Fuller, Raman, Wallenstein, and de Chalendar (2019), who confirmed business leaders feel anxious as they struggle to marshal and mobilize the workforce of tomorrow. Ahsan (2018) also asserted that effective succession planning as a strategy that can help business leaders and human resource managers manage talented employees amid a downsizing phenomenon.

To conduct and achieve methodological triangulation, I reviewed the interview data of the six participants to ascertain the impact of an effective succession plan as a key determinant for identifying and retaining talented employees during an organizational crisis like downsizing. I also reviewed the annual reports and corporate websites of the participants' employers to seek information about succession planning dictum. P3 and P6 corporate website proclaimed the dictum of "a diverse workforce where there is equity available in hiring, development, and advancement regardless of team members' dimensions of difference." The website of P3 and P6 also disclosed, "As we look toward the future, we are continuing to invest in our nearly 350,000 team members and create good jobs that allow them to thrive," and "We believe an investment in them is an investment in the future of our business." The dictum for the service retailer of P1 and P4 denoted, "From a business perspective, we know that if we want to continue to be the best at what we do to attract and retain the best talent," and "We foster a winning mindset and provide all colleagues with the programs and opportunities they need to contribute to the business and their own growth and development in a meaningful way." Lastly, the service retailer website for P2 and P5 stated,

> Our long-term investment in the success of people of all races and genders is also reflected in the diversity of our management team—our management team is heterogeneous when it comes to age—top-level managers are traditionalists and boomers as well as members of Generations X, Y, and Z.

These corporate websites extended knowledge consistent with the responses of all six participants that succession planning can have a sizeable effect on the workforce demographics and the ability of a human resource manager to react to an organizational crisis like downsizing in a manner that talented employees are retained, thus achieving an effective succession plan for a multigenerational workforce. The consistency of the collected data forms the basis for the theme of succession planning. The findings of the study confirmed effective succession planning is a concept utilized by business leaders and human resource managers to identify and retain talented employees in the event of an organizational phenomenon like downsizing. Consequently, because of the multigenerational demographics of the current workforce, business leaders and human resource managers must create a useful succession plan to identify and manage a pool of talented employees for retention during a downsizing phenomenon (Kichuk et al., 2019).

Findings Related to the Conceptual Framework

McKinley et al.'s (1995) institutional theory of downsizing was selected to gain understanding and useful strategies for retaining talented employees during a downsizing. I also used McKinley et al.'s institutional theory of downsizing to explore strategies some human resource managers use to retain talented employees during downsizing. McKinley et al.'s institutional theory of downsizing social factors is constraining, cloning, and learning. McKinley et al. hypothesized four conditions—(a) dependence, (b) ambiguous performance standards, (c) uncertain core technologies, and (d) frequent interaction between firms—as social pressures influencing downsizing. These conditions emerged during the data analysis phase. McKinley et al. suggested human resources managers benchmark to (a) reduce dependence, (b) clarify ambiguous performance standards, (c) moderate technological uncertainty, and (d) disrupt standard interaction patterns. These four benchmarks align with the central themes of transparent communication, performance management, and succession planning, providing implications for human resource managers to evaluate the relevance of a downsizing strategy as evaluators for the appropriateness for downsizing and the reduction of external forces. Table 2 contains the discussion evaluators for the appropriateness for downsizing.

Table 2

Evaluators for the Appropriateness of Downsizing and Reducing External Forces

	Social forces		
Implication for managers	Constraining	Cloning	Learning
Reduce dependence	√		
Clarify ambiguous performance standards	√	√	
Moderate technologies uncertainty	√	√	
Disrupt (frequent) standard interaction patterns	√	√	√

Transparent communication relates directly to McKinley et al.'s (1995) institutional theory of downsizing the social force of constraining. The social force of constraining occurs when business leaders notify human resource managers about their decision to reduce the dependence of external forces that influence downsizing, clarify the performance standards being used to review and downsize talented employees, moderate core technologies to understanding the reason for downsizing, and disrupt standard interaction patterns between internal and external factors that stimulate the behavior of downsizing. According to Gandolfi (2014), constraining is the social force that coerces managers of an organization to conform to institutional rules to define legitimate structures and management activities. In line with the study findings of Cohee (2019), human resource managers must provide transparent, candid, and inclusive communications to leaders and managers relating to a downsizing rationale.

In the face of uncertainty, McKinley et al.'s (1995) institutional theory of downsizing social force of cloning relates to the conditions of ambiguous performance standards, uncertain core technologies, and the frequent interaction between firms. The behavior of cloning links to management techniques of performance management. When initiating a downsizing strategy, human resource managers clone the behavior of performance management of an industry leader to clarify ambiguous performance standards and moderate technologies uncertainty (reengineering of human capital) as evaluators of this strategy. Similarly, cloning will disrupt standard interaction patterns between firms to reduce the level of an external force's influence on the performance management process, thus increasing its probability of successfully retaining talented employees during downsizing.

Cloning is the result of mimicking those managers of organizations that represent a benchmark of prestige regarding excellence in their industry (Muñoz-Bullón & Sánchez-Bueno, 2014) as a consequence of haste by managers in an environment of extreme uncertainty (Alexiev et al., 2016). DeNisi and Murphy (2017) believed that business leaders and human resource managers measure the effectiveness of talented employees using performance review appraisals. According to Freeman (2013), human resource managers must know the skill level of employees to avoid ambiguities about their capabilities when evaluating an employee for retention or downsizing.

McKinley et al.'s (1995) institutional theory of downsizing noted the social force of learning unfolds with the use of organizational standard management practices relevant to frequent interaction between firms. Further, McKinley et al. found the social force of learning occurs through a network of educational institutions and professional associations. In line with McKinley et al.'s findings, Ellinas et al. (2017) found participants (i.e., business leaders) exchange common experiences with other leaders through frequent interaction. These leaders use frequent interaction between firms to develop management practices for downsizing, and human resource managers utilize frequent interaction between firms to advance a succession plan to identify talented employees for a downsizing event. Notwithstanding, human resource managers also counterbalance the frequent interaction between internal and external factors and may disrupt the behavior of leaders from reducing human capital to comply with institutional and social norms. The recent literature findings of Ahsan (2018), Donohue and Tham (2019), Rajput et al. (2019), and Sawaneh and Kamara (2019) are consistent with the findings of McKinley et al., who opined social forces from external environments influence the behavior of an organization.

Likewise, Cohee (2019), Boštjančič and Slana (2018), and Taha and Esenyel (2019) emphasized business leaders implement downsizing due to the influences of social factors. The responses of the six participants of the current case study align with the principles of the key constructs of McKinley et al.'s (1995) institutional theory of downsizing (constraining, cloning, and learning) and may be partly driven by social forces and not motivated entirely by anticipated financial benefits. The three themes delineated in this case study—(a) transparent communication, (b) performance management, and (c) succession planning—demonstrated relevance to the conceptual framework of McKinley et al.'s institutional theory of downsizing.

Applications to Professional Practice

The purpose of this qualitative study was to explore strategies some human resource managers use to retain talented employees during downsizing. I used a multiple case study design to underscore the experiences of six successful human resource managers as defined by the participation inclusion for this case study. The human resource managers may not have successfully retained talented employees without the skills of (a) open communication, (b) performance management, and (c) succession planning.

McKinley et al.'s (1995) institutional theory of downsizing was the conceptual framework used to guide the current case study research. The results of this qualitative multiple case study aligned with and underpinned the institutional theory of downsizing. The study findings also reinforced Armstrong and Taylor (2017) argument that strategic human resource and talent management processes are activities used to forecast and deviate the direction of an organization in turbulent times, so that business needs and collective needs of employees can be met by developing and implementing coherent and practical human resource strategies. By incorporating the results of this study into business objectives could benefit organizational strategies and prove to be valuable to business leaders, human resource managers, and talent managers engaging in the formation of useful employee retention strategies for retaining talented employees during downsizing.

Business and human resource leaders could use the findings of the current case study to implement or rebrand an organization's talent management strategies benchmarks for retaining talented employees during downsizing. These benchmarks should include talent planning, potential leaders, and recognition of talent for succession planning. Talent planning would promote transparent communication between managers and employees to align their personal expectations with the goals and objectives of the organization. Based on performance and tenure, potential leaders would be extended an invitation to participate in a multimethod assessment to identify talented employees. Once recognized, talented employees would receive talent management action planning with a specific set of expectations and development opportunities for retaining a talented employee.

McKinley et al.'s (1995) institutional theory of downsizing was the conceptual framework used to guide the current case study research. The outcome of the current data analysis revealed three underlying themes: (a) transparent communication, (b) performance management, and (c) succession planning. These themes have direct relevance to the professional practice of an organization. The use of McKinley et al.'s approach embodies factors for downsizing that could encourage human resource managers to evaluate the appropriateness of terminating talented employees and implementing an effective downsizing strategy. The insights gained from the findings of this case study may add to the body of knowledge of effective downsizing strategies human resource managers use to retain talented employees, therefore, reducing the gaps in the literature. Without these strategies, human resource managers may not successfully retain talented employees during turbulent phenomena like downsizing. Consequently, these strategies could help current and future leaders and human resource managers mitigate the loss of talented employees during downsizing. The findings of this study may contribute to the professional practice if business and human resource managers obtain additional knowledge on how to create successful downsizing strategies that will yield the retention of talented employees during downsizing.

Implications for Social Change

The results from the curren case study may provide useful strategies for human resource managers looking to retain talented employees during a downsizing phenomenon, which could positively influence workforce reduction. Maintaining talented employee employment levels is critical to the social change/behaviors of individuals, communities, organizations, institutions, cultures, and societies where they lived. The lack of knowledge of how organizational restructuring could lead to misalignment of talented employees and could negatively influence organizational performance is critically important (Kraemer et al., 2016). Therefore, the results of this study could reduce the gaps in the literature and knowledge by providing successful employee retention strategies for talented human resource managers during downsizing. By using the strategies from the findings of this case study, the knowledge of effective downsizing strategies being used by human resource managers could provide current and future business and human resources managers with tools to retain talented employees during downsizing. These downsizing strategies tools may lead to a more stable workforce and community.

From a social change perspective, the findings of the current case study might positively impact social change by providing useful retention strategies for retaining talented employees, which could lead to a decrease in talented employees’ separations. The U.S. Bureau of Labor Statistics (2017) reported 2 million layoffs and discharges of employees attributed to the 60.1 million total job separations in 2016; employee separations are on the rise, and talent is scarce. By utilizing the strategies from the findings of this study, human resource managers may positively influence social change by employing useful employee retention strategies such as applying open and transparent communications, assessing performance appraisal reviews, and implementing succession planning to minimize the negative effects of downsizing. An effective downsizing strategy could positively influence workforce reduction by minimizing the number of families impacted and social chaos caused by downsizing (P. Tsai & Yen, 2015). The findings of this case study could be used to contribute to positive social change by providing human resource managers with useful talent retention strategies for retaining talented employees and supporting displaced employees with resources to mitigate the detrimental effect of unemployment and could beneficially affect social change/behaviors on family life. The implications for positive social change include the potential for business and human resources leaders to eliminate personal bias and promote workplace equality, thus sustaining a labor market participation of these individuals in their respective communities.

Recommendations for Action

The intention of this multiple case study was to explore strategies some human resource managers use to retain talented employees during downsizing. Based on the findings of this study, utilizing a pragmatic employee retention strategy may provide the organization with a blueprint for retaining talented employees during downsizing. After exploring some of the strategies employed by participants, I propose three specific recommendations for action.

First, business leaders need to understand the role of a human resource manager during downsizing. The current study's results disclosed that the role of a human resource manager is to (a) manage predownsizing communications with transparency, (b) evaluate performance review appraisals to identify employees for retention, and (c) create a succession plan comprised of talented employees who may best create value for the organization in the future. Second, a human resource manager should communicate with other human resource managers effective downsizing strategies being practiced for retaining talented employees during downsizing. Lastly, a human resource manager should create a succession plan to decrease talented employee separation during downsizing. Consequently, I recommend that business leaders and human resource managers must align organizational and human resource objectives to influence favorable talent sourcing and retention. I also recommend that business and human resource leaders create mutually achievable business objectives. Likewise, I recommend that business and human resources managers continuously engage in performance management and transparent communication with their employees to identify talented employees.

My intent is to publish the findings of this case study with the ProQuest Dissertations and Theses Database to reach a broader audience and provide each participant with a courtesy copy of this case study for their personal library. I will also pursue opportunities to present the findings of the case study with human resource professionals at relevant forums, educational institutions, professional conferences, and business-related events globally.

Recommendations for Further Research

I conducted a qualitative case study on strategies human resource managers use to retain talented employees during downsizing. The strategies identified in the study are essential for retaining talented employees during downsizing. The findings of this case study were based on the knowledge and insight of six human resource leaders in the service industry located in metropolitan Atlanta, Georgia. I used a purposive sample process to collect data from only six participants. First, I recommend that future researchers conduct a similar study using staff employees as interviewees be expanded to capture the depth and richness of the research data. Second, I recommend a more extended threshold of time to conduct a research study. Last, I recommend future researchers employ a mixed method approach using a qualitative method of interviewing by means of a larger sample population and a quantitative method of hypotheses by means of statistical data in an industry-specific sector to gather relevant data to increase scholarship and gain an understanding of downsizing and talent management retention strategies, resulting in the retention of talented employees during downsizing.

Reflections

My doctoral journey was a journey of perseverance. The process for obtaining my Doctor in Business Administration was arduous, time-consuming, meticulous, and overwhelming. During the coursework phase of the doctoral program, I was able to dialogue with various professionals in the business sector globally. I was also able to share my perceptions and experiences of my professional sector that affected the day-to-day activities of an organization, thus enhancing a classroom environment for useful conversation and constructive criticism from doctoral colleagues and doctoral faculty. The intent of this qualitative multiple case study was to explore strategies human resource leaders use to retain talented employees during downsizing. The participants for this study included six human resource leaders who have successfully retained talented employees during downsizing.

The process of obtaining six human resource leaders with previous or current employment history was arduous. I contacted a total of 20 individuals with HRM experience in downsizing to participate in this case study; 10 did not respond to the original invitation, and four refused the invitation stating they did not wish to participate because of the time constraints to conduct the study. For the participants who consented to participate, the dialogue was enlightening. I used the interview protocol to guide the interview to ensure the line of questioning and to capture information on the subject matter. After completing the interview process and member checking, the data I received provided me with a body of knowledge on how to successfully retain talented employees during downsizing.

I am familiar with the undertaking of employment downsizing and have a prior employment relationship with some human resource leaders participating in this study. However, to legitimize the integrity of collected data, I set aside any personal biases during the collection of the data. In the role of researcher, I focused on presenting findings and recommendations of this case study in an objective and ethical manner. The findings of this case study have confirmed and broadened my body of scholarship on downsizing and talent management retention strategies that business and human resource leaders can use to minimize the number of individuals and families adversely affected and reduce the social chaos caused by a downsizing activity.

Conclusion

Downsizing is a standard business strategy used by business leaders to improve organizational efficiency, promote competitiveness and productivity to reduce costs, restructure organizations, and eliminate employees (Kwamboka & Nassiuma, 2017). Downsizing talented employees does not always yield a positive result—financial or otherwise. Downsizing usually harms thousands of employees, creating financial problems and social issues (Marques, Galende, Cruz, & Portugal Ferreira, 2014).

Downsizing is not the only possibility, nor the most advisable response, when an organization faces financial problems. Rightsizing, lateral redeployment, and internal promotions are some advisable responses to downsizing during a crisis. By identifying and understanding the root cause of the problem, business leaders may decide to use human resource strategies for retaining talented employees.

The reasoning for the current qualitative multiple case study was to explore strategies human resource managers use to retain talented employees during downsizing. The targeted population of this study consisted of six human resource leaders located in metropolitan Atlanta, Georgia. The case study generated three themes successfully used by human resource managers to downsize appropriately and retain talented employees. Henceforward, when leaders discover the causation for downsizing and advocate for useful talent management and employee retention strategies to lessen the adverse effects of the phenomenon, HRM can engineer talent management practices to foster a multigenerational workforce of talented employees.

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Appendix A: Interview Questions

1. How does your organization define talented employees?
2. How does your organization identify which talented employees will be displaced due to downsizing?
3. How does your organization support the needs of talented employees who will be displaced?
4. What strategies did the management of your organization use to reduce the dependence of social pressures as determinants to downsize?
5. What strategies did the management of your organization use to clarify performance standards as determinants to downsize?
6. What strategies did the management of your organization use to moderate the uncertainty of technologies as determinants to downsize?
7. How did you address the internal and external barriers to implementing effective strategies to retain your talent during downsizing?
8. What strategies have you found to be most useful in retaining your talented employees during downsizing?
9. What additional information can you share about the appropriateness of a strategy to retain talented employees during downsizing?

Appendix B: Interview Protocol

A. The interview session will begin with salutations, introducing myself to the research participant, and the research topic.

B. I will thank the participant for responding to my invitation to participate.

C. I will ask if the participant has any questions concerning the interview or research topic before signing the consent form.

D. The participant will receive an executed copy of the consent form for their records.

E. I will turn on the tape recorder, and notate the date, time, and location of the interview.

F. The coded sequential interpretation of the participant's name, e.g., 'Participant 1,' will be denoted on the audio recorder (or electronic storage device), documented on the original consent form before the beginning of each interview.

G. Each interview will span approximately 60 minutes for responses to the nine interview questions, including any additional follow-up questions.

H. I will recap the purpose of the study before asking questions 1 and 9. The purpose of the case study is to explore strategies human resource leaders use to retain talented employees during downsizing.

I. I will inform the participant regarding the review of the interview report after transcription for accuracy and member checking.

J. After the interview, I will thank the research participant participating in the research study.