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# Organizational Engagement Strategies Used by Midlevel Managers in the Energy Industry

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College of Management and Human Potential

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Joni Hoxsey
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Walden University
2023

Abstract

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Industry

by

Joni Hoxsey

MBA, Texas A&M University – Central Texas, 2013

BS, Tarleton State University, 2010

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

August 2023

Abstract

Company employees often see an organizational engagement breakdown when managers do not combine processes and knowledge transfer strategies to achieve goals. Some midlevel managers lose communication and collaboration among business departments as well as with their subordinates, leading to a breakdown in organizational performance. The purpose of this qualitative single case study was to explore organizational engagement strategies midlevel managers use to encourage organizational performance. The theory of organizational learning provided the conceptual framework for the study. Six midlevel managers from various departments in an energy company in the midwestern and southern regions of the United States independently participated in semistructured interviews. Secondary data included company documents, news articles, and external organizational reviews; data were thematically coded. After analysis, the data led to the following conclusions: organizational engagement strategies comprise of building a positive organizational culture and providing effective resource management. Results indicate organizational engagement strategies have a direct impact on organizational performance. Key recommendations are for managers to use organizational decision making, employee engagement, improvement opportunities, technological resources, human capital, processes, and procedures. These recommendations can improve organizational performance, employee talent and retention, and higher wages. The implications for positive social change include financial stability for the populace, positively impacting the lives of employees, family members, and surrounding communities.

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Dedication

I dedicate this research project to my husband, David Hoxsey. I never would have even thought a doctoral degree would be possible without his unconditional love and support. David, I tell you constantly that I would not be who I am without you, which is the absolute truth. You have taught me to always strive to be better than the whole sum of myself: use every day to be stronger, smarter, and self-reliant. Because of you, I have and will continue to become a pillar for our family and others as I hope to help as many as possible reach their full potential. Life may not always be favorable in short-term challenges, but hard work and perseverance always overcome. Thank you, honey. You mean the world to me.

My deepest thanks to Dr. John Hannon, whose continuous support ensured that I completed this journey, especially during the times I did not think it would ever happen. When those times came, I heard him telling me to think of those who had their doctoral degrees and just remember, "If they can do it, so can I." Thank you for also sticking with me, even as I went off to "play in the Air Force."

I could list so many other countless mentors who have inspired me along the way, but I cannot possibly list them all. I merely choose to remain humbled by the lessons learned throughout my life and hope to pass on a legacy that shows how the combination of hope, dedication, intelligence, and kindness can make a difference in the world.

Acknowledgments

I could not have completed this doctoral study without the support of many people professionally and academically. First, I must thank many unnamed persons in my past who helped me realize the need to improve management. If I had not personally seen breakdowns in midlevel management, employee turnover, and process inefficiencies and then learned of the difference between toxic and positive environments, I never would have been inspired to find a way to help.

I must thank professors from my alumna experiences who made such an impression. Dr. David Geigle helped me realize my passion for business in his undergrad international business course, which inspired me to discover continuous learning and development. Dr. Stephen Vitucci pushed so hard for me and my MBA classmates to pursue doctoral degrees. I thought the idea was insane at the time, but his words resonated in my mind for years. So many other professors and teachers encouraged me along the way, but these two have distinctly stood in my memory through the test of time.

I must again thank Dr. John Hannon for getting me through my proposal and the rest of my degree. I had become lost in the process and never would have seen the end without his help. I would like to thank Dr. Dina Samora and Dr. Franz Michael Gottleib for their teamwork and added guidance. I must also thank Dr. Krista Laursen for her constant positivity and encouragement, and for shaping the foundation of my study. I only hope that I can apply the knowledge gained from my studies at Walden University to continue making that positive impact within my community and inspire others.

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Section 1: Foundation of the Study

Without knowledge sharing and development, business departments may struggle to develop workforce capabilities and solve problems across an organization (Hutzschenreuter et al., 2016). Furthermore, company executives who do not encourage learning and adaptability may miss opportunities because of employee burnout, disengagement, and dissatisfaction (Rai & Maheshwari, 2021). As an extension of employee engagement, some authors have turned to organizational engagement, which entails how business leaders and culture may also affect employee retention (Barrick et al., 2015). Budriene and Diskiene (2020) recognized a potential shift of focus from employee engagement to organizational engagement, which denotes the need for further exploration of organizational engagement.

**Background of the Problem**

Leaders who lack knowledge of organizational engagement may see negative effects in a corporation. Managers may misunderstand the importance of balancing processes and knowledge transfer (Hutzschenreuter et al., 2016). To elaborate, managers may not have considered a systems approach to develop processes and a goal-oriented focus, which Nadkarni and D'Souza (2015) suggested can improve engagement. Therefore, supervisors may be underutilizing employees and departments. Leaders lacking in organizational engagement strategies may realize a deficiency of communication and collaboration among business departments, leading to a breakdown in performance.

Authors have discovered several approaches to developing organizational engagement. Although a gap in research exists linking organizational practices to firm performance (Barrick et al., 2015), managers can link organizational engagement to organizational efficiency as well as employee well-being (Rai & Chawla, 2021). For example, company leaders who use organizational engagement encourage employees to increase personal engagement and teamwork, realizing how individual performance impacts group results (Budriene & Diskiene, 2020). Furthermore, executives who promote engagement and learning develop employee satisfaction, leadership progression, and competitive advantages (Rai & Maheshwari, 2021). In this study, I explored how organizational engagement strategies business leaders use to increase organizational performance.

## Problem and Purpose

Business leaders have found a growing need for competitive organizational engagement as employee development, engagement, performance, and retention become growing challenges (Delbahari et al., 2019). Leaders can gain a competitive advantage and a 22% improvement in organizational engagement by sharing performance and tacit knowledge throughout a company (Odiri, 2016). The general business problem is that some midlevel managers lose organizational performance opportunities through the lack of effective organizational engagement. The specific business problem is some midlevel managers lack effective organizational engagement strategies to increase organizational performance.

The purpose of this qualitative single case study was to explore organizational engagement strategies some midlevel managers use to increase organizational performance. The targeted population consisted of midlevel managers who were part of at least six business departments of an energy company located in the midwestern and southern regions of the United States. The midlevel managers must have successfully implemented organizational engagement strategies to improve organizational performance. The implications for positive social change include the potential to improve work–life balance, job retention, career development, employee health, and higher wages (Delbahari et al., 2019). The leaders of a firm can promote stable jobs and employee benefits to impact consumer loyalty and the economy (Budriene & Diskiene, 2020). Better jobs and companies can mean financial benefits for stakeholders, consumers, and communities.

**Nature of the Study**

To determine the best nature of this study, I compared qualitative, quantitative, and mixed-method approaches. Ivey (2022) described the qualitative research method as an investigation of people's experiences, attitudes, motives, beliefs, and behaviors involving a phenomenon. Authors can use the qualitative method to complete a thorough, realistic study of a phenomenon (Saunders et al., 2016). A quantitative approach occurs when a researcher uses large samples of data to evaluate the relationships among variables (Dawadi et al., 2021), which was not appropriate for this study as certain variables are unknown to test. The mixed-method approach includes both qualitative and quantitative research for a more robust analysis of a phenomenon (Adekanmbi & Ukpere,

2021). A mixed-method study was not suitable for this research because of the requirement to combine both qualitative and quantitative results, as described by Dirani et al. (2021). The qualitative method was the best option for this study, as the intent was to explore organizational engagement strategies.

Qualitative research designs include ethnographic research, narrative research, case study, qualitative descriptive research, and phenomenological research. In ethnographic design, a researcher investigates a phenomenon by actively participating in a study environment to understand the process instead of the results (Argyriadis, 2021). My focus was not to observe group culture, which eliminated ethnographic design. The narrative study would have been beneficial for a researcher looking to gain multiple perspectives by interviewing participants in a dialogue setting to reveal context within conversation (Lemon, 2019). I did not use the narrative approach because I had predetermined questions. A case study approach is an analysis of a process, event, or setting from the viewpoints of stakeholders (Billups, 2021). I used a case study in this research for a realistic view of organizational engagement. A qualitative descriptive design includes multiple interviews involving all stakeholders who experienced a specific phenomenon (Dewi et al., 2019). The qualitative descriptive approach was not appropriate, as I was not researching the impact of organization engagement on all stakeholders. A phenomenological study is a focus on the lived human internal experiences and changes during a phenomenon (Billups, 2021). Although I was interested in understanding participants' experiences, the main objective of this study was not explicitly the experiences. I chose a single case study to explore organizational

engagement in a realistic natural setting using semistructured interviews along with public and internal documents.

## Research Question

The research question for this study was: What organizational engagement strategies do some midlevel managers use to improve organizational performance?

## Interview Questions

1. What strategies did you use to improve organizational engagement?

2. How are organizational processes and other information communicated throughout the company?

3. How do supervisors and employees participate in organizational goals and tasks within business departments?

4. How did you assess the effectiveness of your strategies to improve organizational engagement?

5. What key barriers did you encounter when implementing strategies for organizational engagement between business departments?

6. How did you overcome these key barriers to implementing strategies for improving organizational engagement between business departments?

7. What other information would you like to share that has not been discussed?

## Conceptual Framework

My chosen conceptual framework was organizational learning. Cangelosi and Dill (1965) first presented the concept of organizational learning, and several authors have

expanded the conversation throughout the years. Argyris and Schön (1978) wrote about single-loop learning (people carry out directions without question) and double-loop learning (people question variables in work processes and improve the processes). Over time, scholars and practitioners have evolved the definition of a learning organization from a flat organizational structure to a knowledge production process and a combined approach of a cultural and social process that includes democratic participation (Dahl & Irgens, 2022). Senge (2006) explained learning organizations are most successful when executives define company-wide goals based on a vision agreed upon all business departments, making the mission widely accepted. A learning organization can complement strategies of technology, marketing, and management operations to develop consumer value (Onwuegbule & Onuoha, 2022). Most, if not all, members and business departments within a firm are engaged in company activities with the learning organization concept.

Woven within learning organizations are several components and complexities. Senge (2006) established three parts to uphold the core learning capabilities of a company, including aspiration in mastery and vision, reflective conversation with mental models and dialogue, and understanding of complexity with systems thinking. Senge designated systems thinking as the fifth discipline of organizational learning, which helps company leaders understand how processes and knowledge sharing among business units and across all levels of an organization can help an organization create value, personal mastery, team learning, and a shared vision. Haile and Tüzüner (2022) elaborated that business leaders who use organizational learning can empower employees to be

innovative, enhance production, and reduce operation costs. Organizational learning fit my study because the many components (i.e., continuous improvement, leadership and management, and communication) that surround the conceptual framework are also considerations of organizational engagement.

## Operational Definitions

*Collective organizational engagement*: A combination of the engagement theory and the resource management theory that expands beyond individual engagement to include collecting and managing resources to maximize value (Barrick et al., 2015).

*Employee engagement*: An employee's attitude and contribution toward their work and organization (Semwal & Dasgupta, 2022).

*Organizational culture*: The beliefs, actions, and systems that employees collectively demonstrate, forming an organizational identity to achieve performance goals (Pracoyo et al., 2022).

*Organizational learning*: The process of achieving organizational goals by applying individual or group learning supported by management practices and labor conditions (Pham & Hoang, 2019).

## Assumptions, Limitations, and Delimitations

### Assumptions

Assumptions are information that a researcher considers true without evidence (Ellis & Levy, 2009). Researchers can assume that participants understand a research topic before their involvement in a study (Ellis & Levy, 2009). First, I assumed that participants would be honest when answering interview questions. Second, I assumed

that some participants would have experience with and understand organizational engagement strategies, whereas some participants may not have known about organizational engagement.

**Limitations**

Limitations are threats to the validity of a study (Ellis & Levy, 2009), yet also an acknowledgment of imperfections to help improve credibility of further research (Zhou & Jiang, 2023). Rai and Chawla (2021) recognized that an organizational engagement study could have limitations if not a longitudinal study that included data collected over time. Because I chose a qualitative single case study, I may have limited the findings by not collecting data over a longer period. A second limitation to my study may have been the participants who volunteered to interview may not have represented all members of the organization, serve as experts, or hold the official stance of the company, as Ellis and Levy (2009) discussed in a research methodology guide. Participants may have had some exposure to organizational engagement but may not have had years of expertise in the area. If participants did not hold an official stance, there could have been a loss of a holistic view of the company and the data could have included individual opinions and not facts. Even with data saturation, participants represented only a small percentage of employee perceptions. Accordingly, some information may not have been available in the collected data.

To eliminate some of the limitations of possible missing data, I analyzed secondary data from internal documents of the participating company. Secondary data collection can eliminate some of the limitations while building more credible conclusions

(Abdalla et al., 2018). I worked to reduce study limitations by including the secondary data of company documentation to have a more holistic view of the successful strategies used within the company. Secondary data have limitations as a researcher adapts previously collected data to become part of a new study with a different purpose (Serra et al., 2018). In addition, researchers who are analyzing secondary data they did not initially collect should be aware of biases that can alter the meanings of the data, such as a researcher's prior knowledge, data without a hypothesis or research question, or a lack of flexibility in the analysis (Baldwin et al., 2022). I considered how secondary data may relieve some limitations but introduce others into the research study.

**Delimitations**

Authors need delimitations to hold studies within a reasonable focus and scope. Delimitations are what a researcher will or will not be undertaking within a study (Leedy & Ormrod, 2005). I intended to focus on participants who are midlevel managers, and as I found snowball sampling necessary, I still did not intend to include midlevel managers who have not been involved with organizational engagement strategies. In this study, the participating company had to demonstrate success in organizational engagement. This requirement of organizational engagement strategies success may have limited the scope. An additional limitation may have been my decision to focus on interview participants who were either implementing or directly impacted by organizational engagement strategies.

**Significance of the Study**

**Contribution to Business Practice**

Companies that promote organizational engagement can gain competitive advantages by continuously discovering improvements throughout all levels of the organization, varying from motivation, tenure, quality work, and organizational performance (Lunn et al., 2021). Managers make strategic decisions based on information and analysis gathered from all business units and levels by including employees who have immediate knowledge of current conditions (Simpson et al., 2019). Managers can impact every employee by aligning strategic goals to promote further learning to encourage higher performance and competencies (Medina & Medina, 2017). Any level of a company has the potential to improve with organizational engagement strategies.

Sharing knowledge across an organization can encourage competitive advantages. Atapattu and Huybers (2022) explained that encouraging engagement and sharing knowledge could develop employee empowerment, allowing employees to generate competencies, strategic plans, and knowledge management processes. Higher participation levels can increase organizational engagement to improve organizational performance in ways such as return on assets, shareholder value, customer satisfaction, and brand equity (Lunn et al., 2021). Knowledge sharing through socialization can shift employee engagement to organizational engagement and create long-term competitive advantages (Budriene & Diskiene, 2020). Knowledgeable organizations have a competitive advantage by encouraging efficiency and proficiency, which increases business performance and strategy (Pham & Hoang, 2019). Business managers may use

findings from this study to identify organizational engagement strategies that leaders can use to encourage communication, teamwork, and innovation, which may improve organizational performance, productivity, efficiency, human capital, and work–life balance for all employees.

**Implications for Social Change**

Employees who participate in high levels of organizational engagement have direct benefits of enriched jobs and higher levels of motivation and satisfaction (Rai & Maheshwari, 2021). Managers affect all personnel with their strategic approaches concerning generational changes, globalization, technology, and diversity, which business leaders recognize as factors demanding greater strengths in communication, learning, and engagement throughout organizational structures. Business leaders using organizational engagement have seen improvement in employee commitment, satisfaction, productivity, and innovation (Delbahari et al., 2019). Companies with noticeable organizational engagement improvements experience improved employee retention, the ability to gain more talented employees, higher wages, and financial stability for the community (Delbahari et al., 2019). Organizations that learn of organizational engagement strategies may promote positive social change by improving management, leadership, and corporate environments, becoming more innovative. Employees may benefit the most with better career choices and wages, improving the local economy, and positively impacting the lives of employees, family members, and surrounding communities.

**A Review of the Professional and Academic Literature**

The purpose of this qualitative single case study was to explore organizational engagement strategies midlevel managers use to improve organizational performance. The research question was: What organizational engagement strategies do some midlevel managers use to improve organizational performance? This section includes my strategy to research professional and academic literature, an explanation of the conceptual framework, and my extensive review of information on this topic.

In preparation for the review, I used sources from Walden University Library, which included the Academic Source Complete, Business Source Complete, EBSCOhost, and ProQuest databases. Supplemental information included a review of books, journal articles, and periodicals from internet sites and various libraries. The main search terms included the following: *employee disengagement, employee engagement, knowledge management, leadership, learning organization, management, organizational culture, organizational effectiveness, organizational engagement, organizational learning, process improvement, productivity, profitability, technology,* and *training*. I also researched the following terms: *human capital, mental models, motivation, organizational change, performance, performance management, personal mastery, shared vision, systems thinking, team learning, teamwork,* and *work cycle*.

**Table 1**

*Summary of Sources Used in the Literature Review*

| Reference type | Count | Percentage |
|---|---|---|
| Peer-reviewed journals within 5 years of 2023 | 79 | 83.16 |
| Peer-reviewed journals more than 5 years of 2023 | 14 | 14.74 |
| Books within 5 years of 2023 | 0 | 0.00 |
| Books more than 5 years of 2023 | 2 | 2.11 |
| Total | 95 | 100 |

I chose organizational learning theory as the conceptual framework for this study and have included a discussion on organizational learning theory, organizational engagement, and other engagement concepts. I considered other topics, such as knowledge management, organizational effectiveness, and continuous process improvement. I contemplated factors mentioned in many business theories, including technology, training and development, management, leadership, organizational culture, employee engagement, employee disengagement, and performance and profitability strategies.

**Organizational Engagement**

Scholars have recognized research gaps concerning engagement and introduced the concept of organizational engagement. Organizational engagement is an event when multiple groups are engaged in separate projects but can combine tasks into a larger undertaking using work processes (Cherin, 1999). Barrick et al. (2015) surveyed 83 small to medium-sized businesses and discovered a research gap where scholars study individual engagement, but practitioners strive for collective organizational engagement (the connection between the firm and individual performance). Authors could reduce a

second research gap with a focus on engagement strategies linked to retention and performance instead of a broader study of company culture (Barrick et al., 2015). Additional research could include the factors and relationships of employee happiness, organizational engagement climate, and organizational engagement, as determined through a survey of 190 respondents of a national police school in Spain (Ravina-Ripoll et al., 2021). Scholars and leaders have discovered that employee encouragement goes beyond personal motivations to include company culture and climate. Leaders who acknowledge the concept of extended engagement strategies may be able to adapt company culture and build an environment focused on the involvement and contributions of every employee.

Departmental managers may try to attract and retain employees at different internal career stages with organizational engagement methods that combine motivation, resources, and performance strategies. Barrick et al. (2015) assessed in a survey how department managers use the three strategies of motivating work design, human resources management practices, and chief executive officer transformational leadership to encourage employees during different phases of employment. Lunn et al. (2021) tested Barrick et al.'s theory in a survey asking 60 acute-care hospital chief executive officers across the United States the same principles. Researchers in both studies found that all variables have positive results but yield higher performance when combined (Barrick et al, 2015; Lunn et al, 2021). Rai and Chawla (2021) concurred with a survey of 27 Northern Indian public sector banks and found that meeting job demands with adequate resources (e.g., extrinsic and intrinsic rewards, organizational support, and supervisor

support) leads to positive job satisfaction and organizational engagement. Based on these three surveys, managers across multiple departments can combine resources to develop motivation and increase employee performance and dedication. Department managers who collaborate beyond the typical hierarchical organizational structure may create an engaging team culture with company-wide goals that positively impact all organizational members.

Employees who experience organizational engagement can also benefit from other types of engagement. Budriene and Diskiene (2020) proposed seven engagement types: (a) job engagement (personal job roles and satisfaction); (b) work engagement (work performance); (c) organizational engagement (motivation of employees to act as a part of an organization); and (d) employee engagement (individual participation and involvement); (e) leader engagement; (f) customer engagement; and (g) sales partner engagement. In four types—job, work, organizational, and employee engagement—leaders see positive turnover reductions with organizational engagement strategies supported by work engagement and job characteristics, as Rai and Maheshwari (2021) found in a 622-survey of employees of 27 Indian public sector banks. Authors who studied organizational engagement considered all types of engagement to reduce turnover and understand the different levels within organizational structures. Such scholars have uncovered an opportunity to explore the resources, performance, and culture variables that may be a part of successful organizational engagement strategies.

**Organizational Learning**

Organizational learning is a combination of several components to change the mindsets of individuals and alter business cultures. A learning organization constantly adapts to alter its future (Senge, 2006). Leaders who follow organizational learning embolden individuals to continuously gain knowledge that will benefit the company, as authors determined in a pre- and post-intervention 800-participant survey (Hasson et al., 2016). Organizational learning is an in-depth business approach in which employees constantly learn and adapt to habitually generate competitive corporate advantages. Business leaders find not only many benefits within the theory organizational learning but also some advantages of the application to develop an industry-leading company.

***Employee Empowerment, Management Benefits, and Applications***

Employees can gain specific skills within a learning organization. Laeeque et al. (2017) concluded from a survey performed among four telecommunication companies that team members from an organizational learning culture are more capable of innovation and knowledge creation. Following Laeeque et al., Dirani et al. (2021) surveyed 48 respondents of academic and government networks and conducted two six-participant focus groups to identify a bond between organizational learning and individual performance where employees are flexible because of developed trust within the company. Dewi et al. (2019) interviewed human resources managers at four 5-star Indonesian hotels and determined employees who learn on the job gain skills specific to their career development, where even an employee with mismatched skills can become competent in their work. Employees can use each advantage to improve work

performance and gain the confidence to try different tasks. As a result, both employees and the company benefit from an organizational learning culture.

Company leaders who use organizational learning may see the difference in human capital and performance among other advantages. Managers and employees who motivate each other in cohesion, transparency, and team learning develop innovation and adaptability throughout the company (Dirani et al., 2021). Laeeque et al. (2017) concurred with a survey that companies grow in adaptability and boost performance because of heightened knowledge exchange, a creation process, and an organizational learning environment. In addition, Medina and Medina (2017) found in a 7-month explorative single case study in Sweden that leaders who inspire continuous improvements encourage employees to problem solve, learn, and experiment. Company leaders who strategize with organizational learning may open communication, motivation, positive reinforcement, and other chains of events. Within a learning organization, all staff can routinely reciprocate the benefits of shared knowledge and constructive feedback, while managers may have a larger influential span.

Although managers decide what information to share, these decision makers can only make an impact equal to their level of influence within the company. In an explorative single case study, Medina and Medina (2017) concluded the ability of managers to make decisions and be adaptive depends on organizational culture. In a study in which five midlevel managers in a large nonprofit Western Canadian organization were interviewed, Udod et al. (2020) agreed with Medina and Medina that supervisors can only impact an organization based on their sense of empowerment. Sengupta et al.

(2022) interviewed 12 midlevel managers in Indian companies and added that managers do not always fulfill job requirements with their competency levels, and they lack time and support to gain the necessary knowledge. Laeeque et al. (2017) provided a solution strategy in training: Managers who receive organizational learning training encourage knowledge creation and make long-term improvements in innovation, performance, effectiveness, efficiency, productivity, competitiveness, profitability, and agility. Supervisors can use personal knowledge and capabilities to impact a learning organization and open opportunities for positive change. Managers can both learn and implement organizational learning components to help employees, business units, and potentially entire organizations.

### *Other Theory Viewpoints*

Authors have compared organizational learning with different concepts, such as learning organization, knowledge creation, and strategic planning. Some authors separate the concepts *organizational learning* and *learning organization*. Organizational learning is the combination of organizational capabilities, leadership styles, and corporate governance (Bilan et al., 2020); whereas a learning organization is a group that uses the continuous process of improvement through constant learning (Dewi et al., 2019). Knowledge creation is a separate concept some authors find essential for organizational learning, as business leaders can use knowledge creation to transform knowledge into economic opportunities with the assistance of information communication technologies, as Li Sa et al. (2020) noted in a survey of 308 small hotel owners in Malaysia. While some authors argue a difference in terminologies, Onwuegbule and Onuoha's (2022)

survey of 123 participants within five Nigerian telecommunication companies revealed how organizational learning aligns with strategic capability by using exploitative and explorative learning strategies to engage employees. Organizational learning involves educational activities for staff members that includes knowledge creation while a learning organization is an element of strategic planning. Nonetheless, managers can couple the concepts to impact businesses both holistically and toward specific tasks. These findings show some authors separate the commonality and declare distinct behaviors between learning organization and organizational learning while reviewing the different concepts of strategic planning and knowledge creation.

Theorists have questioned whether organizational learning has evolved into knowledge management or knowledge creation. Knowledge management is a critical factor and the platform of organizational learning success, as knowledge management includes processes to transform tacit, strategic, and critical knowledge into a learning environment (Dahou et al., 2019). Pivoting from knowledge management, authors surveyed Pakistani telecommunication company employees and determined a learning organization works with knowledge creation (the stock of organizational knowledge) to boost the innovation performance of firms (Laeeque et al., 2017). Knowledge management, knowledge creation, and organizational learning all involve the development and sharing processes of valuable information to be accessible throughout a firm. Therefore, either knowledge creation or knowledge management could be possible evolutions of organizational learning.

Although some theorists have considered the possibility of a learning organization's evolution, other scholars have explored the variables of organizational learning. The core variables include systems thinking, personal mastery, mental models, building a shared vision, and team learning (Senge, 2006). However, some authors have explored other variables, like Soltani et al. (2022) who surveyed 290 personnel of the tax administration in East Azerbaijan in Iran and identified training availability, knowledge level, and technical expertise as the components of a learning organization. Scholars may continue to explore other variables. However, extensive research shows scholars have defined how the confirmed five variables (systems thinking, personal mastery, mental models, building a shared vision, and team learning) affect organizational learning.

### Systems Thinking

Organizational learning is heavily dependent on systems thinking, which is a different way to strategize from common linear thinking and is an advantage for individuals to think ahead in decision making activities. Systems thinking is a circular process of constant internalization of feedback throughout an action (Senge, 2006). A total of 48 engineers and students participated in a survey showing how systems thinking includes the goal to balance potential improvements with minimum effort (Kordova et al., 2018). Individuals can use systems thinking to have a foresight of chain events and anticipate breaking linear cycles. The purpose of systems thinking is the ability to think past the next step of a system to consider the entire process before making decisions.

A balance between an entire system and all the components is the concept of systems thinking. However, systems thinking is not easy to apply because most people

think of single cause-and-effect consequences. The relationships within a system are as important as the independent components (Kordova et al., 2018). For example, managers can use systems thinking to align small changes with organizational goals for better adaptability and sustainability. However, individuals may have difficulty leaving traditional linear thinking (cause-and-effect actions) and risk mismanaging systems thinking (Senge, 2006). Systems thinking consists of a strategic method different from linear thinking that instead analyzes parts into a whole and yields a stronger organizational system. Leaders must understand systems thinking to anticipate reactions successfully.

Leaders can make a positive impact by using systems thinking strategies. Decision makers can expose the root causes behind system-wide problems (Senge, 2006). Managers can then leverage beyond a single correlating action and reaction to instead a chain of consequences. For example, BASF managers developed systems thinking in a performance management system (Tiwari et al., 2015). The managers saw results in enhanced collaboration, value results, communication, and both individual and team performance with the use of systems thinking (Tiwari et al., 2015). Departmental leaders who use systems thinking can clear counteractions and team dilemmas. Managers can encourage employees to collaborate and help an organization flourish with competitive advantages and sustainability.

Staff members can revolutionize business processes with an embrace of the systems thinking mindset. Employees can gain skills to analyze consumer needs and cope with multidisciplinary problems (Kordova et al., 2018). Company members who use

systems thinking can eliminate assumptions, improve communication, and avoid member isolation (Senge, 2006). For example, personnel can strengthen company commitment and become team members, as shown in a survey of 509 students in Korean quality management training sessions (Choi et al., 2016). Individuals who strategize with systems thinking may realize how singular decisions can affect many different components and improve personal skills along with the entire business cycle process (Senge, 2006). Employees who understand systems thinking can impact company performance and break down barriers that provide opportunities to combine individual talent and teamwork within a learning organization.

Managers can use systems thinking to strengthen relations, either as part of a performance management system or organizational learning. Leaders who can stabilize and improve processes also foster loyal consumers while eliminating rework, quality inspectors, and warranty and marketing costs (Senge, 2006). Tiwari et al. (2015) agreed with Senge (2006) that managers create stability by considering the thoughts and reactions of employees during process changes. In addition, BASF managers revealed how implementing systems thinking through a performance management scheme can develop an assessment tool to compare and contrast the results of implemented processes and the actualities of employee behavior (Tiwari et al., 2015). Systems thinking involves many complexities that require deep analysis and forethought that align with company performance. Authors and practitioners should be aware of the possible advantages of company performance and how managers can apply the concept when considering systems thinking.

*Personal Mastery*

Personal mastery includes individual learning and personal growth needed in organizations, an embodiment of an organizational learning culture. Personal mastery is a life-long process where people continually enhance skills, competence, and creative growth (Senge, 2006). In elaboration, personal mastery is a continuous augmentation of individual abilities motivated by plausible achievements (Choi et al., 2016). Individuals throughout entire organizations influence each other and mature through personal mastery. In a learning organization, employees must develop personal mastery to create a long-term evolution of organizational learning within a company.

Employees must share gained personal mastery skills for organizational learning strategies to be successful. Associates can improve organizational performance by sharing knowledge; however, many individuals become hesitant to share information when they feel a lack of trust, support, time, or resources, as confirmed through a 118-participant survey to various Hungarian companies from different sectors (Szondi & Gergely, 2020). Individual learning is not an organizational benefit because of the gap between explicit and tacit knowledge unless employees share tacit information (Hassan & Basit, 2018). Some business leaders have learned to counteract the knowledge gap problem of unshared tacit knowledge with company values centered around people coupled with stimulated individual growth and challenges to increase business profitability (Senge, 2006). Individuals must reciprocate gained knowledge back into companies to help others. Organizations can lose competitive advantages without the existential power of employee knowledge.

Employees and leaders can use personal mastery to gain and share knowledge to benefit both individuals and the company. With awareness of personal mastery skills, staff members have more commitment, initiative, responsibility, and creative tension (i.e., the drive for reality to meet desired achievements and a sense of purpose; Senge, 2006). These members have a welcomed initiative to learn, which makes them committed to knowledge and develops synergy of personal and team growth (Hutasuhut et al., 2021), as well as improves organizational performance (Hassan & Basit, 2018). Managers and employees can inspire personal mastery and shared knowledge as employees individually learn and develop: a needed continuum of created tension in organizational learning. Individuals who excel in personal mastery may benefit by gaining greater personal interests and skills that are also valuable for the company.

Managers may benefit from strategizing with personal mastery. Supervisors can apply personal mastery in decision making activities using reasoning and intuition with systems thinking applications, so managers can strategically identify short-term solutions that can cause long-term problems (Senge, 2006). BASF leaders implemented a personal mastery strategy focused on employees gaining experience, relationship skills, and education, which helped workers gain a career path and specialties while streamlining processes (Tiwari et al., 2015). A total of 360 chief executive officers within small and medium-sized businesses in the United States responded to a questionnaire and divulged how managers benefit from personal mastery strategies as leaders gain career advancements based on personal learning and innovation (Soomro et al., 2020). As a result, managers experience continuous personal development that encourages high skill

sets and levels of personal mastery within top management (Soomro et al., 2020).
Supervisors can align personal mastery with systems thinking while mentoring
employees, which shows the two variables together positively impact organizational
learning by creating lasting solutions and developing engaged tenure employees.
Managers who have used personal mastery have both directly benefitted from high levels
of personal development and seen positive outcomes from managerial guidance for
employers, business units, and firms.

 Challenges can arise when leaders shift company culture to focus on personal
mastery. Former presidents of the companies Kyocera, Hanover Insurance, and Herman
Miller have warned of four emerging perceived conflicts: (a) personal mastery is a radical
change from the traditional business culture, (b) executives cannot quantitatively measure
variables linked to profitability, (c) managers may lack confidence in people, and (d)
lacking common vision is counterproductive and adds stress instead of alignment (Senge,
2006). Managers who lack confidence and limit task autonomy for employees can risk a
decline in employee commitment and quality work (Choi et al., 2016). Learning from
Senge and Choi et al., managers should rely on employee capabilities to help develop
communication and gradual changes in the company culture to avoid a decline in
leadership, collaboration, and employee engagement. Leaders can either address the
challenges of the influence of company culture on personal mastery or risk potential
failures when implementing personal mastery into the workforce.

*Mental Models*

Learning organizations rely on a company culture that employees create based on mental models, or mindsets and behavior patterns. Mental models are independent psychological perceptions of the world based on the knowledge and experience of individuals (Choi et al., 2016). Separated perception is the key, as two people can experience the same event and have different perceptions because of different awareness levels (Senge, 2006). Individuals develop attitudes and behavior based on assumptions and gain motivation through mindsets. With this understanding, authors have explored the positive and negative consequences of mental models.

Organizations can find strengths and weaknesses in the use of mental models. Royal Dutch/Shell realized the positive results of mental models and systems thinking with a centralized planning staff, which by 1979 allowed the weakest oil competitor of 1970 to the be strongest (Senge, 2006). Leaders can implement change management and quality commitments for continuous improvement by changing the mental models of an organization (Choi et al., 2016). Although many positive improvements can emerge from strong mental models, negative models can grow just as quickly. Executives who lead with a weak common vision could see dysfunctional teamwork because of the gap between individual and collective mental models, or a difference between individual perceptions and a common understanding (Tesler et al., 2018). Senge found organizations lacking awareness of collective mental models create a negative reality, resist change, and hinder growth by examining how Detroit auto executives initially missed the manufacturing revolution of the Japanese Just-in-Time inventory system because of

unrecognized mental models. According to Senge and Choi et al., teams of managers and staff can successfully overcome challenges with strong communication and shared mental models. Meanwhile, teams with misperceptions can realize equal negative and unproductive results (Senge, 2006; Choi et al. 2016). Managers and teams can learn from the effects of mental models and use them as a strategy for change instead of an unrecognized risk.

Authors have suggested different application strategies to align mental models. For example, storytelling is an option that some teams use to narrow the gap between individual and collective mental models to improve team performance (Tesler et al., 2018). In a varied method, BASF managers used the 360-feedback process to gain feedback from peers, teams, managers, and customers to create open communication, employee engagement, and opportunities to question the status quo (Tiwari et al., 2015). Personnel can use both storytelling (to align mental models) and the 360-feedback process (to frequently check alignment) to promote positive change, advance collaboration activities, and enhance performance. Organizations and teams can increase cooperation for a common goal among these two suggested applications of mental models.

Supervisors can oversee a variety of exercises to help individuals identify mental models and develop open-mindedness throughout an organization. Moreau (2020) interviewed 12 pharmaceutical employees and found leaders who use idea-creation tools (i.e., brainstorming, mind mapping, best/worst idea, and whiteboarding) enhance innovation, diversity, and cohesion. Other managers may use a left-hand column exercise

where two participants write situational thoughts in the left column and their actions or conversations in the right column to determine if they identified problems and resolutions (Senge, 2006). Professionals may also check personal mental models with personal reflections (compare personal thoughts to outer influences) or with the application of evidence-based management theory (assessments of social and ethical factors), which can occur at the individual, organizational, or societal levels (De Graaf, 2019). Supervisors who work to improve themselves and test multiple mental models can optimize solutions and all individual understandings. Mental models are important to a learning organization as staff work to understand multiple perceptions and learn from each other.

### Building Shared Vision

Shared visions combine individual ideals to create a large common goal. A shared vision is a snowballing effect with constant input from all persons to include personal growth and influences and find the commonalities among people to build main accomplishments (Senge, 2006). Managers can use shared visions to include all employees to build strategies and achieve a collectively visualized goal (Choi et al., 2016). Leaders also use shared visions to reinforce harmony within the system processes and encourage creative tension (Senge, 2006). Members throughout a company can be involved to build a shared vision in a positive environment with continuous feedback. Organizational leaders can build shared visions by being open to multiple perspectives and collectively constructing one common idea.

By building shared visions, staff can develop common goals and realize results. Commonly shared visions can include systems for employee suggestions,

communications, products, and processes, as suggested in Haile and Tüzüner's (2022) survey of 197 general and human resources managers in 630 Ethiopian manufacturing firms. All personnel should help build shared visions and align goals by continuously communicating personal visions to develop their employee ownership within a company (Senge, 2006). Dirani et al. (2021) identified how shared visions can create network collaborations and encourage efficiency in knowledge sharing throughout an organization. Organizational leaders who implement individual visions into shared visions combine individual and organizational needs that strengthen the commitment and talents of staff members. As employees reach greater potential, organizations produce higher levels of cooperation, innovation, performance, tenure, and long-term growth because of individual input.

Leaders can build shared visions and stronger companies by focusing on the development of themselves, their employees, and the company. Supervisors who implement shared visions accept multiple visions, listen to new concepts and ideas and realize the need for all employee support to try new directions, even from those who may not agree (Senge, 2006). In a workshop experiment, the top management teams of a company found building a shared vision to be an essential practice to understand the purpose and future of a company (Lattuch & Dankert, 2018). In another successful example, BASF leaders aligned departments with shared visions and invited innovation through human resources, developmental opportunities, commitment creation, and a company mission to be the best in the industry (Tiwari et al., 2015). Managers who collaborate with employees can enforce positive shared visions through the

encouragement of innovation, trust, and adaptability. Leaders who have implemented

positive shared visions have witnessed stronger organizational development as managers

combine diverse ideas to align personal goals with the future of the company.

Supervisors and subordinates can encounter struggles with shared visions. Zasa et

al. (2021) surveyed 85 participants from four multinational enterprises and discussed the

shared vision challenges of balancing individual and organizational goals and finding

clarity in vision diversity that business leaders can overcome to foster innovation and

collaboration. Two former corporate presidents and an organizational consultant revealed

three ways how leaders can fail at shared visions: (a) assign work instead of collaborating

with employees, (b) overlook employee contributions and limit management decisions to

linear thinking, and (c) allow negative teams and limit group focus on prevention,

powerlessness, or short-term goals (Senge, 2006). Employee commitment is the most

essential but challenging company struggles, followed by strategic planning and

leadership capabilities, which are avoidable risks if leaders develop shared visions

according to a 271-participant survey in 12 Dubai private schools (Azeem & Mataruna,

2019). Individuals, teams, and leaders all risk challenges caused by either negative or

narrow-minded thinking because of a lack of envisioning the large picture. All members

can challenge negative shared visions by recognizing pessimism and looking forward to

improvement opportunities.

### *Team Learning*

The last component of a learning organization is team learning. The process of

team learning comprises the explorative activities of a group, such as individual expertise

used to mold a holistic concept. Team learning is a process to promote learning both in a group and in outside units (Senge, 2006), as group members learn together through communication, experimentation, and analysis of collective ideas (Choi et al., 2016). Senge provided an analogy of a jazz ensemble, where every individual has separate talents but coordinates together to build a product beyond individual capacities. The idea of team learning is a group collaboration of respective talents and knowledge to create synergy. Group members create a positive environment to optimize collective learning and participation.

Team learning is an independent variable but is impacted by other organizational learning variables and open communication. Team learning depends upon mental models, personal mastery, dialogue, continuous learning, and empowerment, as shown in a survey of 321 employees at a Malaysian petroleum company (Hassan & Basit, 2018). Groups may begin collaboration with dialogue including diverse ideas and different perspectives to gain new insights and knowledge (Rupčić, 2022). Teams depend on communication to convert tacit knowledge to explicit and fully analyze strategies and procedures within a company. Teams feed off the impressions of team members to create stronger holistic goals and improve upon current situations.

Individuals can suppress progress as easily as they can encourage team learning. For example, a chief executive officer once divulged how managers and employees can stifle team learning with the elimination of different ideas and the development of defensiveness and unproductivity (Senge, 2006). Teams that oppose dialogue and discussion avoid confrontation and develop a groupthink culture (Senge, 2006). While

some leaders use team learning to collect diverse thoughts and talents for group accomplishments, people with different learning styles may have difficulty learning together (Hassan & Basit, 2018). As shown in examples of leadership and team behaviors, authors do not believe in absolution and warn of negative scenarios. Team learning may only be a useful tool that workers can use to promote creativity and productivity if they are accommodating to different styles of learning and avoid potential pitfalls such as groupthink and confrontational discussions.

Teams can use team learning with little managerial guidance and develop organizational success. Team members should suspend assumptions, respect each other as colleagues, and appoint a facilitator during all dialogue discussions (Senge, 2006). The oil and gas company PETRONAS has shown an example of successful collaboration as team members who learned and communicated with each other improved performance and encouraged innovation (Hassan & Basit, 2018). In another practice, BASF unit managers used team learning to provide employees with safe opportunities to break out of their comfort zones and maximize learning, yielding higher performance and agility (Tiwari et al., 2015). By using accountability and motivation, team members can brainstorm and collaborate, even in cross-functional work, to improve an entire organization. Team learning workgroups can build open-mindedness, learning, adaptability, self-confidence, trust, and the alignment of the aspirations and abilities of teams and individuals.

Midlevel managers in charge of business units can implement team learning and create competitive advantages within a learning organization. In modern companies, most

teams are business units comprised of expert members with teamwork qualities (Choi et al., 2016). In favor of teamwork, 354 software project team members from various Thailand companies agreed that managers who encourage team learning improve team performance, as knowledgeable teams hold more expertise and potential than individuals (Chamtitigul & Li, 2021). Although managers can make a direct impact on team learning, some supervisors still rely on employees to independently learn and help improve business productivity. Business unit managers can help team learning, advance departmental capabilities, and promote individual potential with the help of team members. Each example alludes to potential progress for organizational learning as teams work and learn together in a constant innovative cycle.

**Knowledge Management**

Knowledge management resembles organizational learning but varies because of the focus on the collection and distribution of knowledge within an organization. Knowledge management is a combination of explicit and tacit knowledge that leaders of any organization can use to create, capture, share, and use knowledge with the goal that data are available to the right person at the right time (Kazak, 2021). Atapattu and Huybers' (2022) survey of 536 employees within 13 Sri Lankan multinational businesses found managers can use knowledge management to promote employee engagement in knowledge creation, sharing, and applications for improved performance. Members who gain knowledge increase their own and their employees' capabilities, strengths, and decision making skills to help companies prosper. Executives can examine the benefits of all employee participation in knowledge management.

All members of an organization can potentially be involved in and benefit from a knowledge management strategy. Atapattu and Huybers' (2022) discussed how leaders use knowledge management to improve individual and organizational performance by encouraging employee engagement through teamwork, rewards structures, learning, performance management, and employee empowerment. Meanwhile, some aerospace manufacturer decision makers have found advantages that may include how employees can easily navigate, retrieve, and query information as needed and provide networking across multiple departments (Mengqi & Weiguo, 2019). Workers can gain information and skills while increasing engagement and performance. Personnel benefits from shared information as knowledge develops employee abilities and assists organizational performance.

Knowledge management involves unit members and managers to create positive properties for organizations. As shown in a quantitative study of 25 oil and gas companies, when subsidiary locations share knowledge with global headquarters, members help an array of global strategy and process improvement decisions (Velinov & Gueldenberg, 2016). In another survey, 29 company directors used knowledge management to create productivity, encourage employees, and develop innovative opportunities (Surijah, 2015). Leaders can use knowledge management to encourage innovation, streamline business practices, and strengthen resources. Knowledge management can offer higher organizational performance with faster and easier work alternatives and dedicated employees.

At least three different processes exist to develop knowledge management. First, managers can organize knowledge management through a process of socialization, externalization, combination, and internalization to convert the tacit knowledge of individuals to shared explicit knowledge, distribute data, and allow other members to internalize information (Surijah, 2015). Second, leaders can choose the knowledge management assessment tool to implement the knowledge management of products, services, or systems to improve employee engagement, company performance, and customer satisfaction (Surijah, 2015). And third, managers can use the FLOW process, which transfers both documented and nondocumented data throughout an organization to improve the information flow, processes, experience, culture, and values (Stapel & Schneider, 2012). Each strategy offers a different method, but all offer application methods to share knowledge throughout an organization. Managers have found multiple processes to successfully implement knowledge management in organizations to positively impact human capital and productivity.

Knowledge management has some disadvantages when applied in work environments. Individuals with poor communication could adversely affect information flow for global organizations (Stapel & Schneider, 2012). In mergers and acquisitions, the parent company members benefit the most from the knowledge shared the least, which is a breakdown of communication that may include the loss of market data of both consumers and competitors (Velinov & Gueldenberg, 2016). However, leaders who are aware of company culture, processes, and communication can help create collaboration throughout the entire organization (Stapel & Schneider, 2012). Poor communication may

be the main cause of failed knowledge management strategies (Velinov & Gueldenberg, 2016). Managers should understand the potential of poor communication in knowledge management theory, which could impact the application of the theory and the potential managerial use.

Scholars have considered areas of further research for knowledge management theory, such as employee engagement or organizational learning. A survey sent to company directors included results on how knowledge management complements employee engagement to improve corporate performance (Surijah, 2015). The outcome embodied how knowledge management focuses on the sharing of information whereas employee engagement depends on the vigor, dedication, and knowledge absorption of employees (Surijah, 2015). Knowledge management is critical to organizational learning as the instrument that managers use to provide information as the basis of learning within an organization (Kazak, 2021). Furthermore, 47 international hotel employees located in Algeria revealed some similarities between organizational learning and knowledge management as both concepts include leadership, teamwork, training, development, and shared information (Dahou et al., 2019). As knowledge management evolves, scholars may find additional factors or determine whether the theory is a component of employee engagement or organizational learning. Knowledge management can help benefit performance, employee engagement, and organizational learning but currently does not have the depth of organizational learning.

**Organizational Effectiveness**

Multiple views of organizational effectiveness cause the meaning of the concept to vary. For example, authors conducted a 280-participant survey and defined organizational effectiveness as a combination of goal attainment, employee behaviors, performance, competitive advantages, and financial performance (Raina & Shahnawaz, 2017). To agree, a study of 18 diverse companies included results that goal attainment is a successful organizational effectiveness strategy, but systems, competing values, and strategic constituencies methods are also other successful strategies used with the theory (Nadkarni & D'Souza, 2015). Leaders can motivate employees using goal attainment, develop open systems of transformation processes, negotiate goal priorities, and meet stakeholders' satisfaction to create efficient companies (Nadkarni & D'Souza, 2015). Managers create the concept of organizational effectiveness with the combination of employee motivation and performance to obtain financial success. Groups develop organizational effectiveness by tailoring goals to meet specific needs and benchmark success.

Most stakeholders within company structures that use organizational effectiveness have seen a positive impact. Employees in both the public and private sectors have shown that organizational effectiveness does not differ between the roles of employees and managers, nor among different industries (Raina & Shahnawaz, 2017). However, managers sometimes have more opportunities for implementation, as shown by 24 hotel managers who used organizational effectiveness to improve a wide variety of organizational goals, including financial outcomes, customer satisfaction, employee

training, and promotion (Manoharan & Singal, 2019). Employees who experience transparency because of organizational effectiveness strategies can build trust, commitment, and innovation for a company, as shown in a 350-employee survey from three IT companies in Bangalore city, India (Jha et al., 2019). Although managers and employees are both affected by organizational effectiveness, managers have a greater ability of strategic approaches that can in turn help employees trust the company and develop innovative products. Members can use organizational effectiveness strategies to achieve goals while increasing engagement, productivity, and organizational performance.

Two organizational effectiveness applications discussed among authors include the strategic constituencies approach and the systems approach. Some managers use the strategic constituencies approach to align company benefits with personal goals, determine the priority-level of a goal, and any dependencies of a goal within projects or personnel (Nadkarni & D'Souza, 2015). Other leaders use the systems approach to define connections between the inputs and outputs of a business (Nadkarni & D'Souza, 2015), which some see as an opportunity to assess the values of employees as shown between the visions of goals and realities of output performance (Raina & Shahnawaz, 2017). Managers use the strategic constituencies approach to analyze streamlining opportunities and the systems approach to see connections and opportunities possibly ignored in business activities. Leaders can use either strategy to understand how individual employees accept company goals to achieve organizational effectiveness.

Authors discussed other approaches to organizational efficiency, such as the effectiveness model, the process approach model, and the artificial neural network approach. Some managers use the effectiveness model to identify organizational problems rather than focus specifically on organizational effectiveness (Raina & Shahnawaz, 2017). Leaders within various industries in Qatar have used the process approach to combine the transformation process with resources to create goods and services (Al-Shaiba et al., 2019). Meanwhile, 230 employees of manufacturing companies in South Africa identified time management, lean manufacturing, efficiency reporting systems, and employee motivation as the key tools of organizational efficiency (Sookdeo, 2021). Authors have explored different models to achieve organizational effectiveness, in which some appear to focus on processes and effectiveness but vary in approach. Leaders can use the effectiveness model, process approach, or artificial neural network approach for complex analyzations to refocus business opportunities, similar to the strategic constituency and systems approaches previously discussed.

**Continuous Process Improvement**

Organizations can use continuous process improvement to create longstanding advancements. Continuous process improvement is a perpetual drive leaders use to strengthen the organization (Schonberger, 2018). For example, Schonberger suggested managers use employee-recorded frustrations as raw data for constant opportunities to improve mindset, culture, knowledge management, routines, and engagement. In a 170-participant survey of 10 consumer goods companies in Pakistan, employees showed they are more engaged with improved skills, positive change management attitudes, decreased

production time, and expanded product range (Saad et al., 2020). All company members can gain knowledge and develop streamlined processes to eliminate pragmatic breakdowns of the work cycle. Continuous process improvement is a strategy for all employees to use and potentially gain intellectual capital and analytical skills, workflow efficiency, and overall well-being.

Two common approaches to continuous process improvement are Kaizen and Lean-Kaizen. The Japanese term Kaizen is a composite term that means change for good and includes practices of constant, sustainable improvements in incremental changes (Mercadal, 2020). Managers who use this concept follow the overall idea of continuous process improvement by making small changes gradually to create large advancements within the organization. From a 350-participant case study in India, managers chose Lean-Kaizen to eliminate such issues and remove ineffective activities and implement change using value stream mapping, poka-yoke, standardization, visual control, or a lean building block (Kumar et al., 2018). Both the Kaizen strategy and the Lean-Kaizen strategy focus on making continual small changes for long-term gratification. The Kaizen strategy is also similar to organizational engagement and organizational learning because managers focus on company culture and involve all members to continuously reach common goals.

Six Sigma and Lean Six Sigma are two strategies different from Kaizen and Lean-Kaizen. Managers use Six Sigma to define, measure, analyze, improve, and control processes that sometimes also include verifying at the end through a variety of process improvement and development plans (Qayyum et al., 2021). Lean Six Sigma includes Six

Sigma practices with a focus to reduce waste or errors, originally for manufacturing but applicable to other sectors (Tay & Aw, 2021). In a Six Sigma define, measure, analyze, improve, and control approach case study of an Indonesian start-up technology company, managers reduced customer waiting time to less than 20 minutes during the onboarding stage (Wartari et al., 2021). Meanwhile, the findings from an action research case study showed that Lean Six Sigma reduced the scrap rate at an automobile manufacturing company (Shokri, 2019). Managers of a multinational healthcare company used Lean Six Sigma to streamline their supplier selection process by developing clear communication, information sharing, and operational procedures (Tay & Aw, 2021). Six Sigma and Lean Six Sigma both include deep analysis of improvement opportunities, investments for change, and carefully planned implementation practices to gradually introduce new forms of productivity. Managers who use Six Sigma or Lean Six Sigma see similar results to the Kaizen strategy in advanced processes and culture.

Agile business process management and agile business process are two more continuous process improvement strategies. Leaders can use agile business process management to increase employee participation in new processes while changing management and culture, as shown in a study about the Pan American Health Organization and World Health Organization in Nicaragua (Rodríguez & Molina, 2018). The purpose of agile is to flatten an organizational structure to better work across a company with specialists to make fluid changes within the company. An updated version of agile business process management is an agile business process, which adds technology specialists to the organizational design (Rodríguez & Molina, 2018). Artelt

(2021) conducted 16 interviews and a survey with 45 respondents in German industries of technology, consulting, telecommunications, banking, transportation, energy, and sales. Results included how employees saw improvement opportunities using agile project management to influence culture, structure, processes, strategy, and leadership within their organizations. All three versions focus on how to change organizational culture to improve processes and communication. Managers found that the agile business process management strategy is a combination of both people and technology to continuously improve an organization.

**Training**

One business strategy that focuses on employee development is training. In an 800-participant pre- and post-intervention survey, participating leaders used training to promote continuous learning, conversation, team learning, systems, system connections, empowerment, and leadership (Hasson et al., 2016). Meanwhile, a 357-respondent survey of managers in five Pakistani service industries included results that organizational leaders who focus on training to improve individual and organizational performance can create competitive advantages (Hussain et al., 2023). Support can be formal or informal to demonstrate the caring a manager has for colleagues. Training is an aspect that can demonstrate care for employees and serve as a return on investment for the company.

The more executives emphasize training within an organization, the more managers and employees realize the benefits. For example, a survey of 418 employees from eight private media corporations noted that training and development programs develop a trust climate and improve employee retention and work engagement (Rafiq et

al., 2019). Questionnaire results from 250 employees in the corporate sector of Pakistan entailed information that employees who receive training can have a boost in intrinsic motivation and creativity (Naizm et al., 2021). Employees also gain empowerment and an appreciation for system processes, as managers improve and measure the consistency, availability, and usefulness of training opportunities (Hasson et al., 2016). Employees benefit from training through gained skills, as they help the company in return with higher performance, profits, and employee commitment. Support from managers solidifies employee growth and inclusion within the company.

Managers can further assist their teams by receiving training. Managers need training in topics like transformational leadership to encourage and develop employees (Hasson et al., 2016) because managers have a larger significant impact on organizational performance (Hussain et al., 2023). Managers can gain leadership, management, and technical skills through tailored training programs. Supervisors with additional knowledge of management styles and team-building capabilities can help departments, cross-functional teams, and other areas of organizational development.

Although some managers advocate for training, some authors have identified challenges to motivating employees to learn and measuring the impact of training. For instance, some supervisors have difficulty encouraging employees while others have learned to emphasize continuous learning by rewarding developed employees, either monetarily or with other incentives (Hasson et al., 2016). Some scholars differ on how to measure the impact of training and organizational performance (i.e., profitability, market share, and effectiveness) while some managers acknowledge the difficulties of

recognizing group learning gained from individual tacit information (Hussain et al., 2023). Managers can use workforce training as a competitive business strategy that rewards employee development and tenure. Yet, training is a never-ending learning process that is difficult to analyze because of the implicit knowledge employees gain and the variations of perceived information.

**Leadership**

Although the study of managers is much of this research, leaders are like managers but have different traits and can emerge at any level within an organization. Leadership and management both consist of influence, collaboration, and goal-achievement, but leadership includes adaptive and constructive change (Northouse, 2016). Leadership is a social influence where individuals create a climate that develops followers, according to a case study of healthcare staff (Ahmed, 2019). Influential people hold both themselves and others to certain behavioral standards. Leaders can inspire individuals to reach both greater potential and deeper levels of personal satisfaction.

Influential leaders can impact the success of a business in a variety of ways including organizational performance and employee behaviors. Leaders with empowerment and collaborative strategies can influence employees to provide quality services and remain loyal to an organization, as Cziraki et al. (2020) found in a 478-participant survey of Canadian nurses. In a separate survey of 180 manufacturing firms in nine Chinese cities, employee behavior and firm performance are positively correlated by the perceived integrity of leadership (Wei et al., 2020). Katou et al. (2021) found in a 657-employee survey of 99 private Greek companies that leaders with high levels of

social intelligence positively impact employee work engagement, and organizational performance by encouraging creativity and productivity. Confident leaders serve as role models who inspire higher achievements. The mindsets and chosen actions of leaders can positively affect organizational performance and employee behaviors.

Some leadership styles have negative consequences. The root of poor leadership may lie within Plato's leadership theory of virtuous and nonvirtuous leaders or high-moral leaders versus others lacking positive characteristics (Bauman, 2018). Two examples of bad leadership are: first, healthcare leaders who neglect staff can create a decline in the standards of patient care, and second, most business cultures have pragmatic instead of proactive approaches to promote positive environments (Ahmed, 2019). Hight et al. (2019) interviewed 72 hospitality employees in the southeastern United States and identified six bad leadership attributes, including the following: (a) unprofessional, (b) autocratic, (c) poor leadership skills, (d) unethical, (e) poor operational and technical skills, and (f) poor decision and delegation skills. When employees have a poor opinion of leadership integrity, they have less trust and support for the organization, which harms firm performance (Wei et al., 2020). Poor leaders can impair a business environment and employees by determining the surrounding culture. Influential leaders can positively or negatively affect a group based on personal abilities and actions as well as ethics and virtues.

At least 11 different leadership styles have evolved since Plato's time. The modern relevance of Plato's five identified leadership types: (a) the philosopher or wisdom-seeker, (b) timocratic or courageous winner, (c) oligarchic or wealth-obsessed,

(d) democratic or freedom protector, and (e) tyrant or power-driven (Bauman, 2018).

Other types of leaders may include the: (a) authentic who are genuine and gradually

develop, (b) servant who focus on community, (c) adaptive who adjust to new conditions,

and (d) team leaders who work alongside employees (Northouse, 2016). The different

personalities and backgrounds of people create different types of leaders and impact

employees. Leaders have different leadership styles based on personalities, interests, and

goals.

      Transactional leadership is a common style. This type of leader has a direct

exchange between a manager and an employee (Northouse, 2016). Specifically, a 258-

employee survey indicated that transactional leaders provide recognition and awards to

employees in exchange for continued employee hard work and accomplishments (Ho &

Fu, 2018). Transactional leaders motivate employees based on direct transactions

between managers and employees. This type works well with linear thinking, as action

reveals a direct and anticipated consequence.

      Another common leadership type focuses on the character growth of the leader to

harvest a positive change in employees. Transformational leaders' impact on human

capital and empowerment has a direct connection with employees' decision making,

innovation, and production (Saad et al., 2020). Overall, executives work to motivate and

inspire workers to a common vision (Ho & Fu, 2018). Transformational leadership may

be a large part of developing organizational learning, as trainers in an industrial company

used transformational leadership to increase understanding in the company while

improving the communication of goals, vision, learning, and feedback (Hasson et al.,

2016). Transformational leaders inspire employees to reach their full potential. All leadership varies in style yet impacts companies and business units in distinct ways.

**Employee Engagement**

A theory linked to organizational performance is employee engagement. Employee engagement is the cognitive, emotional, and physical commitment and involvement of employees toward a firm (Shrotryia & Dhanda, 2019). From 273 questionnaires in Nigeria's banking industry, authors determined employee engagement incorporates work environment, effective leadership, training and development, a human capital emphasis, and employee creativity (Adekanmbi & Ukpere, 2021). A survey of 623 participants within various companies provided results that in addition to the availability of job resources, the personality variations of individuals (i.e., liveliness, diligence, social boldness, and sentimentality) can affect employee engagement (Albrecth & Marty, 2020). Staff may also view employee engagement as a balance between the approaches of co-creational (teamwork is used to reach common goals) and functionalistic (stakeholders are seen as resources needed to meet goals), according to a study of 32 phenomenological interviews (Lemon, 2019). The availability of organizational resources, the personalities of individuals, and the interactions among individuals can affect employee engagement. However, employee engagement is directly involved with the wellbeing of an organization and is linked to several internal factors.

Leaders and managers depend on employee engagement levels because of the impact employees have on organizations. Employee engagement positively impacts employee performance, as Grobelna (2019) found in a survey of 222 employees working

in 12 Polish hotels. In Rafiq et al.'s (2019) survey of 418 employees from private Pakistani media organizations, employee work engagement has a direct impact on turnover intentions, trust, and job embeddedness (i.e., the employee's connection and compatibility to the organization and sacrifices needed to leave the company. Individuals reflect their perceptions of the work environment in their productivity and commitment. As shown, individual employee performance can impact organizational performance and the strategic direction of the company.

Some business leaders recognize the challenges of employee engagement, such as the demands of societal changes, time pressures, challenges, and hindrances. In a survey of 130 employees in an Indonesian airline, participants revealed young employees up to the age of 35 are not likely to remain committed to an organization, possibly because of more opportunities or unmet expectations (Purnama et al., 2022). A study of 122 public service employees included results of a different employee engagement challenge: As employees strive to work faster and longer, individuals become more frustrated to meet daily time pressures (Baethge et al., 2019). Challenges and hindrances to job demands may also impact employee engagement, according to a survey of 608 junior managers in the Indian public sector banking industry (Rai, 2018). Challenge demands are well-being, poor health, and emotional factors that negatively impact employees while hindrance demands are barriers, constraints, or obstructions that stifle employee learning, personal growth, or goal obtainment (Rai, 2018). Social and business demands are changing to include generational priorities, time sensitivities, and individual needs. Managers and

leaders should be aware of how these challenges can impact an organization and how to address the demands and strengthen employee engagement.

Employee engagement entails different implementation strategies as discussed by scholars. Some managers try to eliminate turnover by encouraging organizational commitment to employees, high compensation (i.e., pay, incentives, holiday allowances, and health insurance), and employee engagement (Purnama et al., 2022). Managers also develop new job engagement strategic possibilities as they communicate, share knowledge, and provide internal support and public relations (Walden et al., 2015). All employee engagement strategies involve managers accommodating worker considerations. As the exploration of employee engagement strategies may continue, authors may gravitate to further study manager and employee communication relations.

**Employee Disengagement**

Separate from employee engagement is a strategy called employee disengagement. Members of four different organizations participated in 13 focus groups and discussed how employee engagement and disengagement are not opposite concepts, as employees may be engaged within the workplace but disengaged from their job because of job boredom (Harju & Hakanen, 2016). In a study of an advanced practice provider council who assists four Wisconsin hospitals, Condit and Hafeman (2019) credited employee disengagement, dissatisfaction, and turnover to the potential lack of role clarity, visibility, and decision making abilities. In a 303-participant survey, participants disclosed that employee disengagement varied not only by company culture, but by the business sector, public or private (Aslam et al., 2018). Managers work to

identify and prevent disengagement opportunities in the form of risk-management activities (Aslam et al., 2018). Employee disengagement implies improvement opportunities to prevent job disengagement, a loss of company culture, and workforce production for any workplace.

Most organizations currently face challenges associated with employee disengagement. Managers and leaders can create disengaged employees through negative political influence, organizational injustice, and work overload (Aslam et al., 2018). Another study that consisted of focus group interviews included a discussion of an array of disengagement: (a) job boredom from a lack of learning, (b) workers displaced in roles, and (c) employees with too much or too little work, which all three types of disengagement can hinder personal growth (Harju & Hakanen, 2016). Staff can become disengaged for a variety of reasons that surround a lack of interest or a missed opportunity to realize the relevance of a specific job. Employee disengagement is an act of human nature that can include multiple internal factors linked to the organization, consumers, and stakeholders.

Staff at various levels within a company can affect a company with moral disengagement and unethical behavior. Moore et al. (2019) conducted four case studies totaling 1,825 participants within American and Chinese work contexts to determine whether unethical leadership impacts employee moral disengagement, whereas an employee's moral identity mediates the extent of influence. Managers who follow a bureaucratic culture may negatively impact employee performance by feeding organizational politics, rigid policies, and unfairness (Aslam et al., 2018). Moral

disengagement is a version of employee disengagement that includes immoral behavior which an individual may deny or unconsciously commit. The moral disengagement of one person can influence others and negatively impact an entire company.

Managers at all levels can use strategies to deter employee disengagement. Top-level managers should avoid a bureaucratic culture, midlevel managers should control consequences for politics and injustice, and low-level managers should equally distribute work (Aslam et al., 2018). Ethical leaders can juxtapose moral disengagement with self-regulation and influence (Moore et al., 2019). More specifically, supervisors who function as part of a team can create a relaxed environment, which gives employees an incentive to accept additional assignments (Aslam et al., 2018). Managers can decrease employee disengagement with direct and indirect strategies, which may optimize performance and tenure. Employee disengagement is similar to employee engagement; however, leaders focus on the prevention of negative consequences.

**Performance and Profitability**

Performance and profitability can be important factors in engagement strategies. Most managers and authors use the financial and operational performance indicators of a company to define profitability as an overview of revenue and sales in a period, whereas performance is the value of human capital that impacts employee productivity, product quality, on-time delivery, and adaptability (Bendickson & Chandler, 2019). Two subcategories of performance exist. For example, participants in Canada's Workplace and Employee Survey helped define workplace performance as a combination of profitability, productivity, and changes in net operating revenue (Zeytinoglu et al., 2017). The second

subcategory of performance is employee performance, which is an assessment of work and personal accomplishments influenced by organizational leaders (Ho & Fu, 2018). Employee performance can positively impact measured financial or nonfinancial outcomes, as shown in Abedini Koshksaray et al.'s (2020) questionnaire of 292 employees and managers in the Tejarat Bank in Iran. Profitability remains a simplistic definition concerning profit margin; performance includes complexities in measurable and nonmeasurable attributes. Scholars have reviewed whether a definite correlation exists between performance and profitability, as the success of employee performance is noticeable in the financial outcomes of net operating costs and revenue.

Executives can concentrate organizational goals around performance and profitability. Leaders can promote innovation through technological research and development, knowledge sharing, and continuous learning to increase job performance and profitability (Ho & Fu, 2018). Findings within an exploration of the service–profit chain within the United States incorporated information on how human resources managers impact performance and profitability in a different way than supervisors, as they focus on recruitment strategies on employee satisfaction, motivation, and employee attitudes and behaviors (Madhani, 2019). All organizational leaders and managers can promote innovation and teamwork to optimize performance and then profitability. Performance can positively impact an organization and its profitability.

Supervisors can experience challenges to raise performance and profitability. Vasilenko's (2019) surveyed 10 sales departments within a Russian retail company and identified 12 consequences of low employee motivation that impact profitability, which

emphasized high staff turnover, poor career growth opportunities, job and management dissatisfaction, low initiatives, and poor company climate. Other managers try short-term solutions for hiring part-time and temporary employees to increase profitability, only to discover long-term decreases in productivity and profitability (Zeytinoglu et al., 2017). As a result, managers learn not to look for short-term solutions but instead learn to motivate employees to commit long-term. Small daily commitments to employees and resources can build to create a stronger workforce, which can improve organizational performance and profitability.

In addition to executive and managerial challenges, employees can struggle to optimize performance and profitability. Returning to the example of part-time and temporary employees, workers find more flexibility with short-term and part-time employment but receive less training and risk the ability to perform all aspects of their jobs (Zeytinoglu et al., 2017). Employees can also lose trust, commitment, and performance if managers are distant, and employees are challenged with work–life balance issues and an unsupportive organizational culture, according to Gider et al.'s (2019) survey of 309 doctors in four Turkish training and research hospitals. Employees receive the consequences of management decisions, while all members risk productivity and profitability. To counteract risks, managers may consider both short-term and long-term negative effects of their decisions in balancing productivity and profitability.

Before planning to gain profitability, supervisors should consider different strategies to increase employee performance. Managers can optimize performance by following human resources management practices, creating a healthy work environment,

and providing supporting tools to employees (Madhani, 2019). Specifically, managers who develop a strategic motivational system that includes tangible, intangible, and individualized methods increase job performance and profitability (Vasilenko, 2019). Meanwhile, other authors who reviewed empirical evidence of employee reports added the importance of knowledge sharing, employee cohesion, and being learning oriented (Layaman et al., 2021). All strategies involve managers in building open communication and positive environments that welcome employee engagement. Higher engagement can yield greater performance throughout a company.

Once performance increases, managers may see a direct impact on profitability. Managers can implement a human capital development program, focused on training and personal growth but varies per business needs (Bendickson & Chandler, 2019). Human capital directly impacts organizational performance and then firm profitability, as Bendickson and Chandler (2019) studied how improved player performance increased competitive advantages and revenue for 30 Major League Baseball teams in 8 years. Furthermore, chief executives with a long-term approach to human resources management retain employees and in turn improve profitability (Kettunen, Martikainen, & Voulgaris, 2021). Metrics will vary among each company, but all managers should combine training and financial skills to track profitability changes. Managers can realize multiple impacts between performance and profitability and should consider long-term effects before choosing approach strategies.

**Summary**

The literature review consisted of several topics, including the organizational learning conceptual framework. Senge's (2006) explanation of organizational learning discussed how the combination of systems thinking, personal mastery, mental models, building a shared vision, and team learning can promote teamwork and growth throughout departments and entire organizations while creating adaptability and sustainability for a company. Executives have realized a myriad of benefits to the successful use of organizational learning, which varies from an increase in individual and organizational performance to more creativity, learning, resources, and capabilities (Soomro et al., 2020). As business practices and needs continue to change, employees who continuously learn and engage within an organization will become more critical to bring new advantages to a firm (Hasson et al., 2016). Business leaders who effectively promote a positive environment such as a learning organization can foster organizational engagement and improve organizational performance.

**Transition**

In Section 1, I considered organizational engagement strategies that some midlevel managers use to increase organizational performance. I presented the following: (a) the background of the problem, (b) the problem statement, (c) the purpose statement, (d) the nature of the study, (e) the research question, (f) interview questions, (g) conceptual framework, (h) definitions, (i) assumptions, limitations, and delimitations, (j) the contribution to business practice, and (k) signs of social change. The literature review consisted of an analysis of organizational engagement and performance.

Practitioners and scholars who understand the different aspects of organizational cultures and motivational methods can better apply successful organization engagement strategies and potentially improve organizational performance.

In Section 2, I present a discussion of the following: (a) role of the researcher, (b) research method and design, (c) population and sampling, (d) ethical research, (e) data collection instruments, (f) data collection and organization techniques, and (g) study reliability and validity. In Section 3, I present the study findings. I explore emerging themes, the application of the conceptual framework, and its impact on social change. Section 3 includes recommendations for action and further study, along with my reflections and conclusions from the study.

Section 2: The Project

In Section 2, I describe the purpose for this qualitative single-case study. I consider participant interviews to understand organizational engagement strategies that midlevel managers use to increase organizational performance. I discuss in this section the following components: (a) reiteration of the purpose statement, (b) role of the researcher, (c) participants, (d) research method and design, (e) population and sampling, (f) ethical research, (g) data collection instruments, (h) data collection techniques, (i) data organization techniques, and (j) reliability and validity.

**Purpose Statement**

The purpose of this qualitative single case study was to explore organizational engagement strategies some midlevel managers in the energy industry use to increase organizational performance. The targeted population consisted of midlevel managers who are part of at least six business departments of an energy company in the midwestern and southern regions of the United States and have successfully implemented organizational engagement strategies to achieve full profitability. The implications for positive social change include the potential to improve an energy organization's management, leadership, and environment while adjusting to generational changes, globalization, and diversity. A firm's leaders could promote social changes to develop a greater purpose reaching communities, stakeholders, and consumers. Midlevel managers can use engagement strategies to generate organizational engagement, learning, efficiency, culture, continual improvement, management, leadership, employee retention, work–life balance, technology, performance, and profitability.

**Role of the Researcher**

The role of the researcher is to collect and deliver the gathered information relevant to a study in a nonbiased format. The researcher is the primary instrument to collect and analyze data by gaining access to participants in their natural environments (Clark & Veale, 2018). Scholars can use technology to collect and sort large amounts of data with long-distance participation from different times (Thunberg & Arnell, 2021). The goal of a researcher is to be accessible to participants and collect data without intervening assumptions. I followed these guidelines as I collected data within the participating company.

Scholars must ensure that their biases and subject knowledge do not interfere with observations and discoveries in research explorations. Researchers gather evidence at a distance from participants, documents, and other sources and must neutralize their own bias, motivation, and interests toward the subject (Billups, 2021). Although I was inspired to explore this research because I previously worked for 4 years in an energy sector supply chain firm as a midlevel manager, I no longer have strong connections to the industry and refrained from any personal assumptions. Scholars use grounded theory to systematically collect and code data without referring to previous assumptions (Hight et al., 2019). I followed the suggestions of Oesterreich et al. (2022) to avoid personal biases by conducting research with the awareness of my personal selection of a study, relying on literature and coding instead of personal opinions to collect and analyze data. I upheld the separation of the researcher's role and participants' roles to ensure consideration of all perspectives and to provide reliable information.

Concerning ethical standards, I followed the principles of the Belmont Report in this study. The Belmont Report provides the ethical principles for the protection of individuals in research studies (U.S. Department of Health and Human Services, 1979). The Belmont Report discusses the boundaries between a researcher and a participant, ensuring privacy, autonomy for participants, and well-being of participants with equal opportunities to contribute to a study according to their merit (U.S. Department of Health and Human Services, 1979). A researcher must provide precautions to protect participants' autonomous involvement, prevent harm or coercion, ensure informed consent, and uphold equal fairness during all interactions, whether face-to-face or via the use of the internet and other technologies (Anabo et al., 2018). A researcher who violates these ethical principles conducts misconduct research involving fraud and deception (Yip et al., 2016). I have gathered accurate information and upheld participants' rights while not creating any harmful results for participants.

Personal biases are potential weaknesses I avoided in this study. A researcher must be aware of personal perceptions and opinions that could affect findings and conclusions, which researchers can avoid by using reflexivity to constantly self-reflect on potential biases (Cypress, 2017). I was aware that my experience as a midlevel manager within an energy sector supply chain corporation could impact my study; therefore, I ignored my personal experiences during data collection and analysis. Clark and Veale (2018) suggested reducing the risk of including a researcher's biases by avoiding the practice of searching and interpreting data that only validates their personal biases on the topic. As shown in the literature review, I explored various applications of organizational

engagement and understood this study could have revealed other methods I was still unaware of. I also avoided individual bias during the interview process by transcribing the interviews before analyzing the data to eliminate the interjection of my personal opinions (see Azevedo et al., 2017). Researchers sometimes use triangulation to review a research topic through more than one source of data to limit personal biases (Abdalla et al., 2018). I avoided personal biases by being aware of opinions I may have gained in previous work experiences by researching the theory, avoiding data that only reflect my personal views, and conducting triangulation to develop robust conclusions based on my research.

To ensure consistency and fairness in all interviews, I followed an interview protocol (see Appendix A). Braaten et al. (2020) defined an interview protocol as a process to build quality and consistency to allow participants equal opportunity and time to thoughtfully answer questions in a detailed manner. The purpose of the interview protocol is also to gather complex data in a comfortable and confidential setting to gain research that may not be available in other research methods. Unlike other methods, the qualitative researcher is directly involved with participants and should recognize that participants are complex and respond differently to the environment around them (Clark & Veale, 2018). A researcher should conduct interviews where participants are in comfortable environments, gain their permission to record, and allow participants to withdraw at any time (Ngozwana, 2018). I described these requirements for participants in the written interview protocol.

I was conscientious of all participants' confidentiality and provided consistent and fair treatment. A researcher can protect the confidentiality and privacy of all participants by safeguarding all collected data including audio and visual recordings and using alphanumeric codes instead of the names of participants (Kara, 2022). I further ensured the interviews remained confidential by using the alphanumeric identifiers P1 through P6. A researcher creates fairness and consistency by asking each participant the same broad questions and later analyzing the data using coding (Pedersen et al., 2015). I ensured fairness by providing the interview questions to the participants before the interview, asking the interview questions in the same order, and allowing adequate time for participants to answer.

To further ensure fairness, I used multiple data collection techniques and upheld accountability. Dooly et al. (2017) suggested collecting data in multiple ways throughout the interview, such as written notes with audio or video recordings. I collected the data by recording and handwriting participants' responses. At the end of the initial interview, I offered to schedule member checking interviews to ensure the accuracy of the collected and analyzed data. Birt et al. (2016) explained member checking of a researcher's analysis with participants can include a second interview as part of triangulation to ensure accurate and fair data. Researchers use the process of transcribing, recording, and member checking interviews to have a continuum of observation of the interviews so they can reuse or reexamine the collected data (Azevedo et al., 2017). I followed the interview process to provide fairness to participants and accuracy in their data.

**Participants**

The qualifying participants for purposeful sampling were midlevel managers in six business departments who had used successful engagement strategies. I also collected data through snowball sampling as purposeful sampling did not produce sufficient respondents, which included other midlevel managers who had been involved with successful organizational engagement strategies. The participants were at least 18 years of age and had experience with organizational engagement; purposeful sampling had the additional criterium of midlevel managers with at least two subordinates. Individuals under the age of 18 are minors (Sil & Das, 2017) and did not qualify to participate in this study. Managers included individuals who have the power to help a company become efficient, effective, organized, consistent, and stable (Northouse, 2016). I used the minimum managerial requirements to offer participation to all company managers who had been involved with organizational engagement strategies. I contacted participants from multiple departments within the organization to help provide different perspectives that I could have otherwise overlooked (see Yin, 2017). I excluded stakeholders beyond these levels to narrow the scope of the study. Before contacting participants, I gained approval from the Walden University Institutional Review Board (IRB).

Strategies for gaining access to participants began as I researched energy companies in the midwestern and southern regions of the United States that have an organizational engagement culture. I identified whether an organization met the criteria through internet research and networked by phone, email, or LinkedIn. I emailed an executive a letter to explain the study and asked for their participation to access voluntary

interview participants (see Appendix B). I included an attached form they could sign and send back as written confirmation of cooperation (see Appendix C).

Once received, I followed the executive's directions and contacted the designated individuals concerning access to voluntary participants and internal documents. I asked in a separate form for a company official to sign for consent to release internal company documents for additional data collection (see Appendix D). In the document, I explained an executive had agreed to the study and I was asking for the release of internal documents concerning organizational engagement strategies. I provided a form of written consent to aid the company official's response to the request for releasing internal documents (see Appendix E).

To collect data, I followed the executive's direction and worked with a company representative to gain contact information for possible participants. Using the provided contacts, I emailed the participation invitation (see Appendix F) and the consent form to midlevel managers involved in the company's organizational engagement strategies. I followed this process to gain access from individuals with informed consent to comply with participants' rights (see Sil & Das, 2017). Before this study, I had no contact with participants, and I did not compensate them for their contributions. I established a working relationship with participants by first sending them an introductory email explaining the study with the consent form attached, encouraging them to ask me questions before deciding to participate. A researcher can eliminate mistrust in a study by building rapport with participants (Sil & Das, 2017). A researcher gains rapport with participants by ensuring informed consent, demonstrating curiosity in their responses, and

minimizing risks with a safe environment and reporting their answers without personal interpretation (Ivey, 2022). A researcher protects participants' confidentiality and prevents influence from others throughout the process (Ummel & Achille, 2016). I followed these guidelines to ensure a working relationship with all participants.

The participants' contributions should align with the research question. To meet alignment requirements, a researcher uses purposeful and snowball sampling to gain participants relevant to the research (Lowe et al., 2018). A researcher can view participants as co-researchers to collect knowledge in an informal way for a study (Lub, 2015). A researcher should search for participants who can contribute to a study based on their knowledge, expertise, and ability to provide knowledge that provides alignment and variation of opinions to create rich content for a study (Pedersen et al., 2015). I aligned participants with the research questions by interviewing midlevel managers who had experience and involvement with successful organizational engagement strategies within the participating company.

## Research Method and Design

I chose a qualitative research method and a single case study research design. I chose this method to explore organizational engagement within a single workplace environment. I investigated the case study in detail and reviewed several units within the same organization to explore organizational engagement theory. In this section, I review the qualitative research method and the research designs that I considered using.

**Research Method**

In a qualitative method, researchers focus on the big picture of gathering a variety of perceptions from individuals involved in a phenomenon. Qualitative researchers confirm, deny, or modify an original theory based on additional qualitative analysis (Yin, 2017). Qualitative scholars review nonnumerical data to understand a phenomenon (Leung, 2015) and focus on categorizing and ordering the information (Cypress, 2017). Researchers use the qualitative method to gain an extensive comprehension of a phenomenon (Dawadi et al., 2021). Qualitative scholars focus on an investigation of the human behaviors, experiences, attitudes, motives, and beliefs toward a phenomenon (Ivey, 2022).

Researchers can collect data in a variety of ways to review how a phenomenon has taken place and how individuals have gauged the change through personal experiences and insights. I chose the qualitative method as I was not aware of all factors involved in organizational engagement. I have researched possible concepts, but I could not verify independent variables and found the information difficult to measure, which I would have needed for a quantitative or mixed-method approach. I planned to further explore organizational engagement strategies instead of explaining possible variables, which finalized my decision to conduct a qualitative study.

Quantitative researchers focus on scientific data collection that involves the statistical study of the results. In the quantitative method, researchers derive results by finding aggregated perceptions within large amounts of data, while scholars using the qualitative method use a variety of small samples of data to gain a holistic picture of a

phenomenon (Billups, 2021). Quantitative researchers identify independent variables that affect a dependent variable, which researchers measure through designs like surveys and random sampling (Yin, 2017). Researchers focus on numerical data for statistical analysis, remove human emotions from the collected data, and ensure reliability and validity in the accuracy of the statistics (Leung, 2015). I was researching data from one organization to review a small sample of data, and I did not know of any independent variables that would determine my need to use a quantitative design.

In a mixed-method approach, researchers use a combination of qualitative and quantitative methods of data collection. Scholars use a mixed-method approach to study complex processes and systems by using the strengths of qualitative and quantitative research methods together (Kajamaa et al., 2020). Researchers can use mixed-methods research for multiple benefits, including complementary data sets, the expansion of a more comprehensive study, and in-depth insights into a phenomenon that is not available with only one method (Dawadi et al., 2021). Researchers have found that mixed methods can be more valuable than a single-method approach by providing more robust information (Adekanmbi & Ukpere, 2021). A mixed-method approach was not suitable for this study, because I had not identified variables to test quantitative data.

**Research Design**

In my quest to better understand organizational engagement, I chose to use a single case study as my research design. Scholars use a case study for the purpose of gaining an extensive understanding of a theory through information such as interview, documents, and artifacts (Hietala, & Päivärinta, 2021). Yin (2017) explained that

researchers use a single case study design to confirm, challenge, or extend a theory. Researchers use a single case study for a deep exploration of a phenomenon from multiple stakeholders' perspectives of an organization or instance (Billups, 2021). I used a single case study to both confirm and extend the theory of a learning organization to include a study of several business departments. I reviewed other types of study designs but concluded that a single case study would be the most appropriate for this type of research.

I considered ethnographic research to see how the phenomenon of organizational engagement could progress within a business. Ethnographic research includes observing, interviewing, and working for a long period in a field (Yin, 2017). Argyriadis (2021) described ethnographic research as a design that a researcher uses fieldwork to create a figurative exchange of data to complete a research puzzle. I chose not to use an ethnographic design, as I was working to review a setting during specific periods instead of continuous observation for several months or a year. Besides, researchers found that ethnographic variables are subject to change, which could deter further studies (Abdalla et al., 2018). I have not identified variables and was looking for transferable data that could extend, confirm, or replace the theory of organizational engagement strategies.

A narrative design was an option that I considered while learning how organizational engagement may develop within a company. Narrative research is a form of explanation research on the big picture of a theory, which can show connections among events that develop into a theory (Yin, 2017). A narrative study includes the empirical data of participants' experiences to provide context and help explain a

phenomenon (Lemon, 2019). Scholars use narrative research to show their interpretation of a study through participants' stories about an event or series of events in chronological order (Billups, 2021). Researchers use this design to show the development of the theory. After further consideration, I decided to show a snapshot in time of how midlevel managers currently use successful organizational engagement strategies.

Scholars use descriptive research to define new terms for a phenomenon. Descriptive researchers describe a phenomenon within an organization, which consists of an organization's history, ownership, employees, organizational system, and financial status (Yin, 2017). Scholars use a descriptive design to catalog empirical information and compare the data to validate the meanings and motives of the emerging themes (Ivey, 2022). Researchers can describe or compare a sample, a single variable, or multiple variables using longitudinal data collection without defining potential relationships (Siedlecki, 2020). I was not looking to answer definitions of types of organizational engagement and hoped to discover potential relationships. Instead, I was researching how managers use organizational engagement. I did not see this design as suitable for this study.

I explored phenomenological research to understand how I could apply this design to my study. Sousa (2014) stated that phenomenological scholars research ideas to show the results of theory development with the general rule that reality is objective, and scholars can explain reality through a series of facts. Researchers use phenomenological design to review a variety of stakeholder experiences and expose their meanings (Lemon, 2019). Scholars use a phenomenological design to understand the essence of the lived

experience of an event by synthesizing the collective participants' circumstances (Billups, 2021). I chose not to use phenomenological research because the design is more for the evolution of the acceptance of theory into society. I did not see this design as feasible since I was looking to see the successful strategies already used in my research topic.

With my decision to use a single case study, I achieved data saturation by completing interviews within the case until I could not reveal new information. Cypress (2017) explained data saturation can occur as a researcher finds recurring patterns and transferability within collected information. When researchers achieve data saturation, they can adequately answer the research question with enough data for analysis (Moreau, 2020). Researchers can achieve data saturation when observations no longer generate new themes (Lowe et al., 2018). I conducted interviews until participants no longer revealed new information or themes.

## Population and Sampling

I used a combination of purposeful and snowball sampling. Purposeful or purposive sampling occurs when a researcher selects the cases for sampling (Saunders et al., 2016). Purposeful sampling is necessary to interview individuals who are involved in a business unit (Dasgupta, 2015). Snowball sampling occurs when initial participants suggest subsequent participants who a researcher could overlook in purposeful sampling (Saunders et al., 2016). Researchers use snowball sampling when participants can suggest other active and knowledgeable individuals (Ngozwana, 2018). I have chosen purposeful sampling to expose quality data and snowball sampling to expand the study to midlevel

managers. I used snowball sampling to offer additional contributions that purposeful sampling may have disregarded.

The adequate sample size was part of my concern for this case study. Qualitative researchers can select a small sample because of the opportunities of in-depth instead of generalized data in nature of a study (Sebele-Mpofu, 2020). Sebele-Mpofu stated there is very little information on specifications or guidelines for a minimum sample size in qualitative research beyond the need to reach data saturation when no new insights emerge. Researchers can face challenges predetermining the sample size as most literature provides generalized guidelines on how to predict data saturation (Hennink & Kaiser, 2022). I targeted at least six interviews because of the nature and size of the organization. As I continued to find new information, I continued to conduct interviews until I reached data saturation.

I set criteria to interview at least six midlevel managers who supervised at least two employees and were involved in organizational engagement within an energy firm located in the midwestern and southern regions of the United States. I considered requiring a specific number of years of management experience but chose not to make such a requirement to include broader perspectives on organizational engagement strategies. I created the criteria based on using purposeful and snowball sampling, which Dasgupta (2015) stated could be used together to include participants who are either involved or aware of strategies while creating a plan of where to stop sampling. I debated including multiple levels of management in my study, such as Katou et al.'s (2021) decision to include senior managers, midlevel managers, and other employees, but I

decided to focus on midlevel management because of the unique position within the organizational structure that these managers experience. I set the midlevel managers from six business departments as the focal point of the data and used snowball sampling as a contingency when purposeful sampling was not sufficient, which extended the sampling to include other midlevel managers who had shown success in organizational engagement strategies.

The amount of collected data varied because of purposeful sampling and contingent snowball sampling. The number of interviews depends on whether a researcher has gathered all new data or themes (Fusch & Ness, 2015). Because of the small sample size, I used semistructured interviews to ask open-ended questions, as Marques et al. (2023) suggested to gain participants' thorough opinions. I chose to support the interviews with secondary data from company documentation, which Serra et al. (2018) explained can be either publicly available or voluntarily provided. I anticipated that secondary data could comprise policies, processes, expectations, and questionnaires, in addition to company publications that explained the firm's mission to create an organizational engagement culture. I utilized the different data sets to enrich my study and include multiple perspectives of organizational engagement.

## Ethical Research

After the IRB approved this study (11-18-20-0663294), I began data collection. I then selected an organization and its participants to conduct the case study. I conducted ethical research by including informed consent, considered incentives for participants,

provided ethical protection, and secured the data for a minimum of 5 years. I have discussed in detail my plans to uphold all components of ethical research.

Ensuring all participants give informed consent before they are involved was of the utmost importance in the study. Participants hold the right to understand the study and make an informed decision if they chose to be involved (Dooly et al., 2017). I sent participants individual communication to allow them an opportunity to decide based on the record that they received all information and avoided influence from other potential participants (Ummel & Achille, 2016). Participants should be involved voluntarily, with traditionally written consent for face-to-face research which can include modifications for online settings (Anabo, 2018). I ensured that I received written informed consent via email from all participants by first explaining the study in writing to potential participants, providing personal contact information in case they had further questions, and providing a consent form for participants to easily read and return. I provided a copy of the consent form to the participant once more at the beginning of their interview.

All participants have equal rights, and I provided fairness and recognized their right to withdraw from the study at any time. Researchers allow participants to withdraw at any time without consequences to build rapport and credibility with the individuals (Ngozwana, 2018). Participants should understand their rights to withdraw from the interview or study for any reason with no penalty (Lemon, 2019). I included the details of withdrawing procedures in the consent form (Yip et al., 2016), as I allowed written or verbal notification of withdrawing at any time. I provided these withdrawal procedures to follow the university's ethical standards and uphold participants' rights.

I considered incentives that promoted participant involvement. Some researchers provide an incentive for participants' meals, transportation, and time (Ngozwana, 2018). However, Willets et al. (2019) warned that monetary incentive is controversial and can include coercive risks and diminished beneficence or justice. Other incentives could include educational and community benefits (Yip et al., 2016). Participants did not receive payment for their contributions to the study but may have found benefits in contributing to an academic study focused on organizational engagement and its impact on business practices and society. I provided individuals a sincere thank you letter for volunteering their contributions.

The Walden University ethical standards that I followed included the guidelines in the Belmont Report (U.S. Department of Health and Human Services, 1979). Ritchie (2021) explained IRBs hold researchers accountable for following the Belmont Report by overseeing and ensuring researchers treat participants ethically. Anabo et al. (2018) elaborated in addition to the three principles of the Belmont Report (e.g., respect for persons, beneficence, and justice), researchers should consider modern technology and its impact on informed consent, privacy, benefits, and risks. Researchers provide respect for persons through anonymity, beneficence by eliminating harm and promoting the good of a study, and justice by providing fairness and equality to all participants (Yip et al., 2016). I conducted ethical research by protecting participants' identities, informed them of any risks before they consented, and provided equal time with the same interview questions throughout the study.

Throughout the process, I have protected the confidentiality and integrity of my research by adhering to these guidelines by providing proper documentation. I initially provided participants with a letter of invitation in which I explained the intent of the confidential study, how I would conduct the study, and my contact information if they wanted to participate (see Appendix F). I then provided participants with an informed consent form that I asked participants to review and sign before the interview process. Once more, participants could withdraw from the study at any time with or without reason by verbal or written notification. A researcher must obtain informed consent before conducting research and uphold participants' rights to terminate their agreement at any time (Dooly et al., 2017). As I provided this concise and understandable information to possible participants, I followed the guidelines suggested by Sil and Das (2017) to create informed participants, uphold anonymity, and develop trust in the researcher-participant relationship. I followed the documented process to ensure the integrity of my research.

The data collection and organization should have been consistent as well. I provided detailed interview procedural information (see Appendix A) to the participants. As explained in the document, I used the alphanumeric identifiers P1 through P6 to conceal participants' identities, as Kara (2022) suggested an alphanumeric code for anonymity. I ensured fair and equal interview opportunities by providing 1-hour interviews and asking the same questions to each participant. I recorded the interviews and provided the participants with an opportunity to review my findings in member checking to ensure the accuracy of their collected perceptions. With these protocols, I

ensured anonymity, fairness, accuracy, and integrity while eliminating any ethical or legal issues in my research, as advised by Yip et al. (2016). I have stored the data collected in an encrypted USB drive in a locked cabinet and plan to destroy the data after a minimum of 5 years.

## Data Collection Instruments

I was the primary data collection instrument, collector, facilitator, and interviewer for this study. Traditionally, researchers have served as their data collection instruments to observe, record, interact, and dissect information for a study (Billups, 2021). Qualitative researchers access participants' natural environments and must acknowledge human complexity in environmental responses and the difficulty in eliminating personal biases (Clark & Veale, 2018). Researchers should realize as the primary data collection instrument that they must withhold their personal view of their study and collect only participants' interpretations (Fusch & Ness, 2015). Therefore, I was aware of my surroundings and excluded personal biases. I used a secondary data collection instrument by requesting public and internal documents applicable to the study (see Appendix D). Secondary data can be an additional sampling of information within a database, such as a government source, private agency, or websites, which are related to the theory researched, but secondary data may include faults within the collection process or could mismatch the purpose of the current study (Serra et al., 2018). I was mindful of the advantages and disadvantages of both my primary and secondary data collection instruments.

While conducting interviews, I followed an interview protocol (see Appendix A). Yeong et al. (2018) stated an interview protocol is necessary for qualitative research to obtain comprehensive data. I interviewed six midlevel managers in a welcoming environment to understand their success in implementing organizational engagement strategies within their business departments to improve organizational performance. Billups (2021) suggested using open-ended questions during semistructured interviews in safe environment where participants can speak freely of the extensive details of their experiences. I began by ensuring all participants met the criteria, which included that they were at least 18 years of age, a manager of at least two other employees in a business unit, and individuals with organizational engagement experience. Barrick et al. (2015) described organizational engagement involvement includes human resources, executives, leaders, and strategic implementation at all levels of the organization. With snowball sampling, I interviewed other midlevel managers who had experience with organizational engagement within the company.

To collect trustworthy data from the interviews, I was conscientious of following a consistent pattern to ensure fairness to all participants. Researchers use the consistency of repeated measures to build reliability (Cypress, 2017). To build consistency, I provided the interview protocol to all participants (see Appendix A), along with the interview questions. The interview began by introducing myself and ensuring participants gave informed consent with the process, which I provided with the initial letter of invitation (see Appendix F) and again at this time. Interviewers can ensure confidentiality by coding data and replacing names with pseudonyms (Pedersen et al., 2015). I ensured

the interviews remain confidential by using the alphanumeric identifiers P1 through P6, which was the continued pattern until I reached data saturation.

Throughout the interviews, I was attentive to participants and the collected data. Billups (2021) explained that researchers should create a safe environment where participants are provided open-ended questions to reflect upon and freely provide detailed answers. Continuing my plan of consistency and creating a comfortable environment, I asked all participants the same interview questions and provided them with adequate time to answer. Researchers conduct semistructured interviews to ask specific questions while having the opportunity to explore participants' thoughts and opinions, clarify questions, and gain extensive answers (Alamri, 2019). I used semistructured interviews and open-ended questions to gather the full perspectives of the participants. I collected the data with audio recordings and typed notes. The audio recordings were important to use with notes to help create verbatim and working transcriptions to correctly note the participant's reflections and use a working copy for data analysis (Azevedo et al., 2017). I used a meticulous approach to gain the trust of the participants while gathering accurate data.

At the end of the interview, I conducted the snowballing approach by asking participants if they could suggest other midlevel managers who may have been willing to participate, iterating that suggestions were not a requirement. I approached three potential participants with this practice, but all declined. A researcher can use snowball sampling to introduce other knowledgeable individuals into the interviews who may have missed in purposeful sampling (Ngozwana, 2018). I closed by scheduling a second appointment for

member checking and thanked them for volunteering their time. Researchers should ask participants to review the findings from their interview and can do so by either forwarding a transcript to the participant or scheduling a member checking interview to verify, modify, and confirm the findings (Birt et al., 2016). I used snowball sampling and member checking to gather accurate perceptions of organizational engagement strategies within the company until I reached data saturation.

For in-depth research, I created a protocol to collect secondary data that could support the primary data derived from interviews. Secondary data gatherings are either designed to answer a question for qualitative research or to review variables for quantitative research (Serra et al., 2018). I focused on research question driven data as I was looking to explore organizational engagement strategies and did not know of all variables linked to organizational engagement. To collect secondary data, when I gained permission from the executive to conduct the case study, I also asked for the executive contact information for a company representative who could release documentation related to organizational engagement strategies (see Appendices C and D).

Once I gained the executive's trust and permission to collect secondary data, I sent a letter requesting a release of documents to the company representative (see Appendix D) coupled with a letter of the agreed document release form (see Appendix E). The requesting document explained the purpose of my study, that I was contacting them per an executive's direction, and that I was requesting permission to use and reproduce company documents related to organizational engagement in a confidential manner. I explained further that I had sole access to the documents and would protect

their confidentiality both during and after the study. I noted that the company may take legal action if I do not follow the agreement. The company representative could contact me concerning any questions and could have chosen to provide organizational engagement strategy documents at their discretion.

I also looked for publicly accessible secondary data that may have helped me gain insight into the company's organizational engagement strategies. Baldwin et al. (2022) described the types of secondary data that could include studies, surveys, and administrative data that a researcher should be aware of possible distorted information because of biases or selective reporting. Serra et al. (2018) suggested that secondary data could include large amounts of data that a company collected but without scientific methods of data collection and could be a mismatch to a researcher's study. I reviewed the documents and determined what was useful and applicable to my study.

Throughout the data collection process, I ensured validity and reliability. I continued data collection until I reached data saturation and no new themes emerged in the information. Lowe et al. (2018) explained that qualitative researchers look for thematic data saturation and warned themes may evolve while researching that may not correspond to the significance of the theory. A researcher must be able to analyze and be engaged with the data to progress in data saturation (Lowe et al., 2018). A researcher can ensure the reliability of the results through data saturation and triangulation (Fusch & Ness, 2015). I ensured validity and reliability by performing member checking and being consistent in the collection process. Dooly et al. (2017) stated researchers should use triangulation when collecting data to secure validity and reliability. I completed

triangulation by conducting interviews within a company, reviewing internal records of the same company, and analyzing public documents of the organization to ensure accurate and in-depth research of the company's success in organizational engagement strategies throughout all levels of the business.

## Data Collection Technique

After IRB approval, I sent possible participants an email using the invitation letter (see Appendix F), which described the purpose of my study. Before interviews, participants must give informed consent in the understanding that their involvement is voluntary and that they have anonymity, privacy, and confidentiality safeguarded by the researcher (Billups, 2021). When I received notification from interested participants, I sent them the consent form. I needed consent forms to explain the use of the collected data and receive participants' written consent before conducting interviews, as explained by Dooly et al. (2017). Anabo et al. (2018) explained that researchers use consent forms to show respect to participants and explain their promise of protection and beneficence throughout a study. I used the consent form to explain the study's process, the steps I would take to protect their information, and any risks they may have experienced.

When I received the signed consent forms, I set times to conduct interviews at the participants' convenience. I conducted 1-hour individual interviews with six participants and emailed them the list of questions before the interviews. I acted professionally with participants while I conducted online or phone interviews, avoiding face-to-face interviews because of current public health safety concerns. I followed the interview protocol (see Appendix A), where I explained the purpose and process of the study,

ensured informed consent, asked interview questions, allowed allotted time for each question, and scheduled a follow-up member checking interview. Researchers take notes and audio-record interviews to serve as raw data from the interviews that can later assist in member checking with participants to verify the data collected (Billups, 2021). I used two recorders and took notes during the sessions to confirm I collected all data accurately.

During the interview process, some researchers are selective in providing examples or definitions to avoid the possibility of creating participants' biases and leading their answers (Hight et al., 2019). Braaten et al. (2020) suggested that researchers be prepared to rephrase or reexplain questions when participants ask for clarity of the questions. I followed this practice and prepared examples to help participants ask for clarification on any interview questions. I performed member checking in second interviews to ensure the accuracy of my findings. Researchers use member checking to validate the results of the interviews while allowing reflection from participants who could add additional information (Birt et al., 2016). I reached data saturation after the sixth interview when no new information or themes emerged from the collected data.

My chosen data collection technique had advantages and disadvantages. Alamri (2019) found the benefits of semistructured interviews can include how: (a) a researcher can alter the dialogue direction for more information, (b) a researcher or participant can ask for clarification, and (c) a researcher can collect three types of raw data (e.g., notes, video, and audio recordings) for accuracy. A researcher can gain a full understanding of the explored theory while increasing the range, correctness, and relevance of the data

(Cypress, 2017). A downfall in interviews without observations is that the research cannot observe participants to better understand their reality (Abdalla et al., 2018). If there is a small group, participants' responses could be identifiable despite a researcher's confidentiality attempts (Ummel & Achille, 2016). Also, researchers working individually or collectively can transcribe interviews in different ways because of diverse times or goals (Azevedo et al., 2017). With interviews, I based information on participants' perceptions and not actions, must have taken extra steps to protect identities, and can misinterpret data no matter the diligent attempts.

## Data Organization Technique

A series of steps may have helped uphold the accuracy and reliability of the data organization technique in my study. Azevedo et al. (2017) suggested researchers follow a process of six steps to fully organize collected data, which includes preparing, knowing, writing, editing, reviewing, and finishing all data. Organizing the data included taking notes and recording participant interviews to take detailed notes of their perceptions. Researchers record interviews for their benefit as much as the participants to eliminate any questions from typed notes and capture specific terminology and speech peculiarities (Azevedo et al., 2017). The preparation of gathering the data was to be with two techniques to assist in the edit, review, and completion stages of organizing my data.

## Data Analysis

This case study included consideration for data analysis processes and the types of triangulation. Researchers may choose to use triangulation to codify and eliminate any discrepancies in their collected information (Sengupta et al., 2022). Dawadi et al. (2021)

explained triangulation can be a part of qualitative, quantitative, and mixed-methods

research, consisting of different types of data to gain a deeper understanding of the

research topic. Data triangulation is a process to combine and integrate multiple methods

to help build stronger research designs (Aguilar-Solano, 2020). Kern (2018) explained

data triangulation can include text, survey, and interview data. The application of data

triangulation included an opportunity to collect different types of data among interviews

and internal and public documents and analyze the emerging themes in the data.

With collected data, the participants may complete member checking interviews

to check the accuracy of my findings. Evers et al. (2020) explained researchers can

import video or audio files into Atlas.ti and avoid transcribing the interviews by creating

quotations and comments within the files. Atlas.ti is the chosen software for the ability to

import the recordings and help me transcribe the interviews, prepare for the member

checking process, and then analyze the data. Transcripts are helpful to minimize

limitations while member checking interviews remove individual biases (Azevedo et al.,

2017). Varpio et al. (2017) suggested member checking to allow participants the

opportunity to consider if their words match the intended meanings and a researcher's

analysis.

The interview transcripts were to be the focus of the Atlas.ti software. Atlas.ti is

specifically a qualitative data analysis software and is similar to NVivo, as both are tools

to help transcribe media files and analyze large sets of data (Evers et al., 2020). While

both software can import codebooks and help develop memos, word clouds, and auto-

coding, Atlas.ti also has colors, icons, and quotations, and the ability to write and link

notes, organize and alter codes, and export reports (Kalpokas & Radivojevic, 2021). Rambaree and Nässén (2021) found that researchers use Atlas.ti to identify emerging themes because the software has several options to organize and structure digitalized information with fast-paced results. Different theme categories may transpire within the coded data, matching themes within other sources of evidence or helping to create a report and tables from the gathered information. I used Atlas.ti to identify codes throughout individual interviews and collectively compare all documents as a data set.

Triangulation and data saturation was used to create and refine codes until no new information or themes exist within the collected data of interviews. Coding involves decoding information to find a core meaning and encoding to label text with a code that labels the heart of the data (Clark & Veale, 2018). Researchers use coding to structure their collected data by categorizing information into themes and subthemes, which helps condense information to the focus of a study (Pedersen et al., 2015). With collected data from the interviews and secondary data, I used coding for the collected data to ensure triangulation and data saturation. The literature on organizational engagement and the organizational learning conceptual framework may help find emerging themes and codes in the interviews and the collected documents. The final step of the member checking process is the coding results, which can validate the interpretation of the data (Varpio et al., 2017). The data analysis may correlate the literature and conceptual framework for the data collected to find consistent and relevant emerging themes within a study.

**Reliability and Validity**

Researchers demonstrate reliability and validity within their work by building rigor and trustworthiness. Cypress (2017) defined rigor as being exact, careful, and precise, while trustworthiness includes quality, authenticity, and truthfulness within research. Researchers strive for rigor and trustworthiness to achieve both validity and reliability because researchers judge written work to determine the merit of the research (Cypress, 2017). Guba and Lincoln (1989) explained that reliability and validity are within the terms of dependability, credibility, transferability, and confirmability. In this section, I used reliability and validity as well as dependability, credibility, transferability, and confirmability contained in a qualitative case study.

**Reliability**

Scholars focus on reliability to reinforce their work with consistent and accurate information. Leung (2015) explained that reliability includes the consistency found in repetitive discoveries and processes from different sources. Researchers using qualitative methods strive for their findings to have reliability and trustworthiness through validity, accuracy, and credibility without influence of personal objectives (Aguilar-Solano, 2020). Alamri (2019) discussed that researchers can ensure validity by coding and grouping collected data to effectively complete the data analysis process. I gathered information in the same way from all participants and used a coding system to ensure the reliability of my data.

Researchers work to provide dependable information that is consistent with the collection and results. Cypress (2017) explained that dependability is an extension of

reliability that researchers can achieve by having at least two experts validate the themes within the collected data. Morse (2015) discussed that dependability refers to the consistency, overlapping methods, or replication within a study. Researchers can achieve dependability through member checking and using triangulation during data collection and analysis to ensure consistency and sequential information (Birt et al., 2016). I provided dependable information by conducting the same interview with multiple participants and by using triangulation to discover consistent themes within the research.

**Validity**

Scholars rely on validity in their work to show the relevance, purpose, and reasoning of their collected data regarding their chosen topics. Validity concerns the appropriate use of tools, processes, and data within research to ensure the information gathered helps explore research topics (Leung, 2015). Validity consists of proper sampling sizes, triangulation, audits of data and processes, and participant verification (Leung, 2015). Researchers using qualitative methods strive for validity through trustworthiness, credibility, and rigor (FitzPatrick, 2019). FitzPatrick suggested achieving validity by using checks along the process, such as the depth of the data, triangulation, respondent validation, and meticulous analysis. Validity is a measurable and accurate representation of the research concept (Lub, 2015). Quantitative and qualitative scholars both demonstrate validity in their work, but qualitative scholars emphasize the relevance of the type of collected data. I ensured validity in my research by exploring organizational engagement and learning organization in my academic literature, and I

only included interview questions that are relevant to organizational engagement strategies.

Experts gain credibility by listening to others' perceptions without interjecting their opinions. Lub (2015) explained that researchers can establish credibility by avoiding misinterpretations of the collected data. Researchers create credibility by telling the participants' true depictions of events without distortions (Cypress, 2017). Researchers must be careful to avoid adding content to a participant's perceptions, whether by asking leading questions or misinterpreting the collected information. I obtained credibility by recording all interactions with participants and avoiding interjections or misconceptions of their perceptions. Some researchers reduce their misinterpretations by using member checking and letting participants review collected data, and set categories, interpretations, and conclusions of a study (Lub, 2015). I confirmed the information by conducting individual member checking interviews to ensure the accuracy of the data analysis.

Research studies become valid and relevant if they include transferable collected data. Morse (2015) defined transferability as the ability of someone to transfer research to another context or other individuals. Lub (2015) expressed how transferability should demonstrate external validity for the information to be useable for other studies. Researchers can ensure transferability by considering the number of organizations and participants in a study, restrictions on the type of provided data, data collection techniques, and the process of analysis (Abdalla et al., 2018). I implemented transferability by asking semistructured interview questions to explore organizational

engagement strategies. My goal was to research data that can extend the conceptual framework and further explore seminal research concerning organizational engagement.

I have reviewed the importance of the ability to confirm my research. Researchers achieve confirmability by including data from the participants' experiences and ideas, not a researcher's objectives and biases (Abdalla et al., 2018). Researchers work to maintain confirmability throughout the research process by documenting, auditing, and journalizing their interactions with participants (Cypress, 2017). Morse (2015) explained that researchers create confirmability through triangulation and auditing. I have demonstrated confirmability for my study by documenting and auditing my interactions with my study participants and by using triangulation during my analysis of study data.

Data saturation is an important step in the collection process to explore all emerging themes within a study. Saunders et al. (2016) defined data saturation as the stage in data collection where additional data provided little or no new information or suggested new themes. Cypress (2017) explained that data saturation, when used with other methods, can help a researcher follow the direction of a study's development through multiple observations and engagements with participants. Morse (2015) explained that a researcher could achieve data saturation with adequate sample amounts and thick descriptions of the interviews or other provided research. Researchers should focus on rich descriptions as quality is more important than quantity in data saturation for a qualitative research study (Fusch & Ness, 2015). I reached data saturation with an adequate sample size by interviewing midlevel managers or voluntary participants who

met the criteria for this study. I contacted 12 potential participants and completed six interviews, where then I reached data saturation and participants no longer presented new themes from the data.

## Transition and Summary

I reviewed concepts in Section 2 that included the following: (a) the purpose statement, (b) the role of the researcher, (c) participants, (d) research methods and design, (e) population and sampling, (f) ethical research, (g) data collection instruments and technique, and (h) reliability and validity. I used Section 2 to research the tools available, and understand how to collect, organize, and analyze data. Through my research in Section 2, I found that a qualitative single case study is the most appropriate research method and design for this study, as I was exploring organizational engagement theory used by midlevel managers in one company. I reviewed techniques to gather needed data, remove personal biases, and gain access to voluntary participants. Through research, I expected at least six interviews to be sufficient to reach data saturation. I ensured ethical research by upholding confidentiality, informed consent, reliability, and validity during the research process. Once I received Walden IRB approval, I began the data collection and analysis process. I used NVivo software to store and analyze the data collected from participant interviews to explore successful strategies of organizational engagement.

In Section 3, I present findings from the case study that explored how midlevel managers in the energy industry use organizational engagement strategies to increase organizational performance. I share the emerging themes found in the collected data. The data have shown how the participating organization implements the organizational

learning conceptual framework within the business, along with the possibilities of

impacting a positive social change. Section 3 concludes the study as I discuss my

reflections and further recommendations.

Section 3: Application to Professional Practice and Implications for Change

In Section 3, I present the findings of this study and identify the emergent themes from the data analyzed. I review the conceptual framework and academic and professional literature to support the findings of this study. I include in Section 3 the following topics: (a) applications for professional practice, (b) implications for social change, (c) recommendations for action, (d) recommendations for future research, and (e) conclusions of the study.

**Introduction**

The purpose of this qualitative single case study was to explore organizational engagement strategies some midlevel managers in the energy industry use to increase organizational performance. I classify the findings into components of my chosen organizational learning conceptual framework, which Cangelosi and Dill (1965) originally defined. In the research that I collected and coded, I found two emerging themes: (a) building a positive organizational culture and (b) providing effective resource management. The themes align with the conceptual framework and other research to improve organizational performance. As building a positive organizational culture and providing effective resource management are part of organizational engagement, this study strengthens the theory that midlevel managers use organizational engagement strategies to improve organizational performance. My recommendations are based on the themes derived from participant interviews and my review of internal and external documentation.

**Presentation of the Findings**

The research question for this study was: What organizational engagement strategies do some midlevel managers use to improve organizational performance? From the analyzed data, I noticed two themes emerge regarding how midlevel managers use organizational engagement strategies to increase organizational performance: (a) building a positive organizational culture and (b) providing effective resource management. The organizational learning conceptual framework, originally coined by Cangelosi and Dill (1965), supported organizational engagement theory as shown through Senge's (2006) defined concepts of systems thinking, personal mastery, mental models, building shared vision, and team learning. By utilizing the scope of organizational learning, company leaders can use effective resource management to create an encouraging employee environment to bring competitive advantages to the organization (Hasson et al., 2016). Based on both literature and the emerging themes, business managers can find organizational engagement strategies beneficial for the improvement of organizational performance and ultimate business success.

**Theme 1: Building a Positive Organizational Culture**

All participants of the six conducted interviews agreed that the internal culture of the organization was an essential part of their team's productivity and their interactions with other departments. Every participant also recognized their responsibility to encourage their employees to succeed, further acknowledging the necessity of a healthy culture to promote organizational performance. The participants confirmed Adekanmbi and Ukpere's (2021) conclusion that a stimulating work environment spurs employee

creativity, which encourages positive work environmental behaviors and sustainability in the workforce. Participants also established Udod et al.'s (2020) and Sengupta et al.'s (2022) beliefs about the organizational learning conceptual framework that managers' level of control and capabilities as well as the considerations of individual knowledge and experiences are essential to organizational performance. Within the data collected, I noted three subtopics that appear to have a direct correlation between building a positive organizational culture and organizational performance: (a) organizational decision making, (b) employee engagement, and (c) improvement opportunities analysis.

### Organizational Decision Making

Business leaders who are successful with organizational decision making avoid breakdowns in organizational engagement. For example, employees may not trust managers who are inconsistent with their words and actions (Dannals et al., 2022). Healthy decision making can improve organizational performance. Lahey and Nelson (2020) stated that a company's success relies on managers making decisions aligned with stated values. The collected data exposed the following components of organizational decision making: (a) company goals, (b) departmental goals, (c) departmental differences, and (d) employee and manager feedback.

Participants agreed that the focus of organizational decision making comes from executive leaders to develop and disseminate company goals. The company's goals are results, customer service, innovation, leadership, empowerment, and valuing human capital, according to the internal company data of ID1, ID11 and ID12. Interestingly, all participants (i.e., P1–P6) and some data from external sources (i.e., ED1–ED9, ED12,

and ED22) recognized how top executives determined the company goals but did not list the same goals. P1 and P2 along with ED3, ED4, ED6, and ED22 listed customer service, which was the only goal with triangulation. However, all participants stated how managers strive toward leadership, care for employees, and encourage collaboration. For example, P4 indicated that "regular communication with my team" helps employees to "buy into your division, and to the corporate strategy." ED2, ED4, ED8, ED12, ED14, and ED22 included acknowledgment of how top management developed a mission and shared vision for the firm.

As discussed in the organizational learning conceptual framework, Haile and Tüzüner (2022) explained how leaders use shared visions, an organizational learning subtopic, to help unite employees. Prieto-Pastor et al. (2018) surveyed 129 Spanish research and development companies and revealed how employees with shared visions can collaborate more effectively and develop higher performance levels. In review of the collected data, employees understood the executive-level decision making process and some of the desired outcomes.

All but one participant mentioned how department managers create their own goals and use them along with company goals to make improvements throughout the fiscal year. P2 commented that goals are "not just the top down where I say what the targets are and here you go." P2 added, "I think it's a collaborative approach show for understanding what, what they [employees] think they can achieve." P6 explained by collaborating and supporting employees through goals that "as the days on that project, then that's where we see how the performance and how they're doing." This practice was

missing within the external data, and ID2 and ID4 were the only internal documents with discussion.

A growing number of researchers have discussed the relation of goal attainment to organizational performance. Raina and Shahnawaz (2017) and Nadkarni and D'Souza (2015) both explained how goal attainment is part of managers' strategies to build organizational effectiveness by tying individuals' goals to a company's goals. Dirani et al. (2021) agreed and discussed how this practice is building a shared vision as part of the organizational learning conceptual framework. Managers who set departmental goals can create benchmarks and develop employee engagement opportunities to use throughout the year.

All participants recognized different priorities among departments, whether in set goals, employee engagement, budget or resource constraints, or organizational culture within the business departments. P5 noted nonholistic goals "can sometimes lead to disruptions." P1 credited a merger as the main disruptor, as one part of the business once "had a lot of resources they could throw at every problem" whereas the other part "ran very lean." ID21 included an acknowledgment of the business complexity that some managers saw as a limitation of standardization and modularization. Within ED22, 22 employees attributed the challenges to a lack of communication, large bureaucratic decision making, or the merger resulting in different mindsets of priorities.

Scholars have explained possible negative consequences and their turnaround strategies that link departmental differences to organizational performance. Velinov and Gueldenberg (2016) discussed how mergers can break down communication within a

large organization, while Hutzschenreuter et al. (2016) explained how departments can struggle solving problems holistically for an entire organization. This concept aligns with Senge's (2006) discussion of the organizational learning conceptual framework's components of systems thinking, mental models, and building a shared vision as employees consider a holistic approach and diverse perspectives to collaborate. Tkalac Verčič and Men (2023) found in a survey of 3,457 employees in 30 Croatian companies that if employees use communication with a social exchange approach instead of only hierarchical data, they can strengthen employee engagement and perceived organizational support. Managers who recognize the challenge of departmental differences can identify this improvement opportunity within the participating company.

Primary and secondary data revealed that managers work to ensure alignment of goals through feedback inclusion. Four participants mentioned using employee feedback in decision making, such as P4's example of a 360-feedback process of a survey and "two-way communication" to build goals, improvements, and employee performance. ED14–ED22 included comments of employee feedback but not how feedback is part of the decision making process. ID3 was the only internal data that included employee feedback, which described in context of labor unions how local relationships are "developed in alignment with the global policy." While some data show the utilization of employee feedback, one internal document does not confirm this as a holistic strategy.

Within the organizational learning conceptual framework, Dirani et al. (2021) discussed how business leaders use employee collaboration to realize improvements of network learning to solve complex organizational problems. Dannals et al. (2022)

elaborated that communication about both company strengths and constraints can improve teamwork, performance, and mindsets between company leaders and employees. According to the collected data, midlevel managers recognize how including feedback can improve goal alignment and eventual outcomes.

### *Employee Engagement*

Participants felt that employee engagement is a vital measure of organizational engagement strategies that managers use to counter employee disengagement. P1, P2, P4, and P5 recognized the risks of employee disengagement as employee burnout in a stressful environment and P1 and P5 added employees' apparent lack of initiative. To overcome both identified challenges, P5 expressed, "More little things than you think can affect an employee's happiness," especially when "people are working with other teammates that they prefer to work with." P2 explained engagement as a "collaborative approach," and P4 discussed giving employees "more challenges, more opportunities, so they can flourish." As shown in ID1, company leaders have defined employee engagement as the success of employees, which they encourage through an "exciting culture, life-long learning and development possibilities." ED22 included a reflection of the culture and encouragement described in ID1 with conflicting information of a lack of support.

Managers who show interest in their employees' professional development can realize a positive chain of reactions. Lemon (2019) explained that employees may see employee engagement as the balance of teamwork and available resources, which Albrecth and Marty (2020) concurred. Senge (2006) also discussed counteractions of

employee disengagement in the components of personal mastery and team learning that encourage lifelong learning and collaboration. The collected data led to the conclusion that managers who provide employee encouragement see an increase in employee engagement. The data showed most managers and employees avoid disengagement by encouraging individual growth of employees and teamwork within the organizational structure.

All interviewees noticed how setting individual goals within departments allows for employee engagement. For example, P3 expressed the importance to "get [the employees'] involvement either in the sense of ideas, their ideologies that may affect the KPIs." P2 described an employee engagement strategy to use "career planning to encourage people" by allowing job variation in different departments "to understand some of those aspects of the business." Company leaders showed belief in ID14 of an "ownership attitude" where people are "drivers of business success," which was supported by ID1, ID2, ID4, ID15, ID25, and ID27. ED22 had some comments of "many opportunities to learn" as a way to build engagement and was validated by ED5. However, ED22 included comments of disengagement such as an employee's warning that "the workload can be overwhelming" and "teams are ramped down and there is no effort to try and retain any of the expertise." ED1, ED2, and ED3 substantiated the claim of a lack of management support with reports of closures and layoffs.

In the organizational learning conceptual framework, Medina and Medina (2017) and Rai and Maheshwari (2021) discussed the importance of managers tying company goals to employees' individual goals to encourage higher performance and competencies.

Senge's (2006) viewpoint of organizational learning emphasized how managers encouraging personal mastery (i.e., individual learning) and creative tension (i.e., desire to grow) can strengthen shared visions and improve organizational performance. The gathered information discloses that the essential need for goal setting at all levels within an organization is to develop purpose and initiative throughout the firm.

Most participants discussed an emphasis on employee incentives as a tactic of engagement, which matched the results of the secondary data. P1, P2, P5 and P6 discussed a variety of employee incentives, including monetary, promotional, and time off. P5 described using a combination of "award-based incentives" and providing employees "more responsibility to become more engaged." P2 added that managers "have to go down to the individual level" as "extroverts want recognition; the introverts just want to have a pat on the back." Internal documentation (i.e., ID1, ID5, and ID13) demonstrated that the company also offered a variety of benefits, flexible work schedules, and growth opportunities. ED14 through ED22 had comments of "good pay, work from home options, good benefits and vacation time." The secondary data supported the claim that the company has employee incentives but did not give the participants' definitive correlation to employee engagement.

Various scholars have discussed support for employee incentives. Rasul et al. (2021) surveyed Ghanaian civil servants across 45 organizations and determined incentives could be as simple as autonomy and task clarity to build organizational performance. Managers incentivizing employees using the organizational learning conceptual framework can benefit organizational performance (Hasson et al., 2016) while

leadership support and encouraged teamwork can reduce employee turnover (Purnama et al., 2022). In conclusion of the provided research, some company leaders have worked to utilize employee incentives to improve employee engagement and tenure.

Some participants realized the benefits of team-building exercises. The participants who described team building mentioned a range of activities and events to build a united group, which was found in some of the secondary data. Three respondents stressed a combination of maintaining "well-rounded teams" (P5), "getting to know the people on a personal level" (P2), and hosting "team events" that can include "really great speakers, and really good meals, and social hours together" (P4). Within ID11 and ID14, top management emphasized building an ownership culture to allow every employee a chance to contribute, which top-level managers also encourage collaboration across the organization. ED22 had 10 employees state they work with a "strong team" of "highly skilled and supportive colleagues." The data have collective agreement emphasizing a direct impact of team building to engagement.

Within the scope of the organizational learning conceptual framework, Senge (2006) and Choi et al. (2016) both emphasized the importance of teams to build communication and shared mental models. Chamtitigul and Li (2020) confirmed how managers can rely on employees' strengths within teams to build their business departments. Team-building exercises have had a place within the organization, which managers have used to increase employee engagement.

*Improvement Opportunities Analysis*

While participants discussed their awareness of nurturing employee engagement, they also expressed their constant analyzation of how to recognize improvement opportunities. P2, P5, and P6 were aware of how their managerial actions could impact employee retention and organizational engagement. To elaborate, Nica et al. (2021) explained that managers cannot regulate what they cannot measure. However, managers commonly lack protocols on how to select and analyze metrics for optimal performance analysis (Kaganski et al., 2019). Participants discussed two key strategies to identify improvement opportunities, which included performance evaluations and management success.

Every participant used some form of performance evaluation, even though they did not agree on a standardized method. At minimum, P2, P4, P5, and P6 agreed that as managers, they routinely set clear expectations of the company, departmental, and individual goals, and follow-up with their subordinates regularly to ensure they met expectations. P1 and P3 discussed the more advanced method of KPI metrics, which P1 explained were available in PowerBI to generate "statistics pages" for "operational performance, supply chain performance" and "goals and targets." ED2–ED7, ED10, and ED12 included reports focused on market shares and consumer demands to measure organizational performance. ID13, ID17–ID24, and ID27 comprised of data that company leaders monitor trends within risk management, cost analysis, and Better Business Bureau company ratings to identify areas of improvement.

Senge (2006) and other scholars mentioned within the organizational learning conceptual framework focused on nonfinancial indicators impact on performance. Meanwhile in the performance and profitability discussion of the academic literature review, Abedini Koshksaray et al. (2020) and Bendickson and Chandler (2019) linked a combination of financial and nonfinancial indicators to performance. In this study, participants relied on nonfinancial while the secondary data showed financial indicators and neither discussed an analysis considering both types. The data led to the conclusion that clear expectations and accountability are strategies managers use to measure progress of individual and departmental efforts toward organizational performance.

Most participants practiced evaluating their personal success as a manager along with their department's performance. Two approaches included assessing the company climate (i.e., internal and external customer satisfaction; e.g., P1, P2, P3, and P6), and the potential productivity developed through leadership (e.g., P1, P2, P3, P4, P5, and P6). P1 described success to be an "instantaneous and daily" assessment which P4 agreed to a constant process of "self-reflection." ID2, ID11, and ID12 provided similar information that showed the participating company defined managers as leaders with diverse experiences that create a value chain within the organization. ED22 included suggestions of improvement opportunities more than actual successes of management. From analysis, some managers may understand their impact on employee performance but other stakeholders may not realize these efforts.

The organizational learning conceptual framework includes discussion on personal mastery to develop creative tension and striving toward higher goals (Senge,

2006). From a leadership standpoint, Ho and Fu (2018) advocated how managers demonstrating leadership skills can positively influence and encourage employees. Ahmed (2019) elaborated on how leaders create a climate that can influence individual behaviors. As mentioned, participants discussed making such improvements through frequent assessments while the secondary data demonstrated the need for managers to be open-minded to improvement opportunities.

**Theme 2: Providing Effective Resource Management**

The second theme of providing effective resource management was another strategy revealed within this case study that is essential to organizational performance. Albrecth and Marty (2020) discussed how the availability of job resources with the complement of building a positive organizational culture can improve employee engagement, which Lemon (2019) confirmed. All participants revealed the vast array of technological resources within the organization. Meanwhile, participants mentioned the challenge of underutilizing available human capital. They overcame the challenge with the theme's subtopics of technological resources, human capital, and processes and procedures. The participants' discussion matched discussion Jia-jun and Hua-ming (2022) derived from a 396-survey of Chinese technology enterprises that a positive organizational culture and effective resource management can impact employee engagement. In result according to Ravina-Ripoll et al. (2021), such support can improve organizational performance.

*Technological Resources*

All participants discussed a reliance on a variety of technological resources, which matched secondary data results. All participants discussed the need for technology because of long-distance locations and traveling work. P1 listed a variety of platforms available including but not limited to Yammer, SharePoint, and an integrated management system. Multiple mentions of technological resources were within company documentation (e.g., ID2–ID5, ID8, ID11, ID12, ID14, ID18–ID20, ID22, ID23, ID25, and ID26), especially plans listed in ID3, ID20, and ID23 to streamline resources in the upcoming year to be within one platform. Within the external data (e.g., ED5, ED7, ED8, and ED11), there were few mentions of technological resources; however, the participants and the internal data included acknowledgment of vast resources.

Some scholars combined technology with other management strategies to optimize organizational performance. Onwuegbule and Onuoha (2022) recognized how managers use technology in conjunction with the organizational learning conceptual framework strategies to create customer value. Ho and Fu (2018) agreed that managers can use technological resources to encourage knowledge sharing and continuous learning, which in turn can help increase job performance and profitability. The collected data exhibited that technology is an important strategy that managers can use to streamline practices and train their employees to utilize on a regular basis.

Participants recognized top decision makers share most of the communication and goals throughout the company using technology, which multiple participants commonly referred to as a "cascading" knowledge sharing approach. "Targets [are] developed by

our global organization, which is then cascaded down to executive senior level management," according to P4. P1 explained the "most effective way that they communicate is through email," which P3 confirmed and elaborated that a follow-up process included through phone calls, text messages, and cell phone apps. Participants discussed how senior managers or human resources managers shared most of the information through email or in postings on online platforms available to all employees. Internal documents included focus on using technology in training (i.e., ID2, ID5, and ID8) and streamlining management systems (i.e., ID4, ID11, ID12, ID14, ID19, ID20, and ID22). ED7 discussed technology impacting product innovation and ED22 employee benefits. While there are multiple technological approaches mentioned, the data sets do not show consistency.

As part of the organizational learning conceptual framework, Lattuch and Dankert (2018) explained the necessity of an organizational structure to have a shared vision to align departments with a common mission. The participants' acknowledgment of company-wide shared information is also an example of knowledge management, which Velinov and Gueldenberg (2016) proved to be an essential process in global organizations. As shown, digitally distributed knowledge within the global organization is a common practice to share expectations, goals, and other communication.

### Human Capital

Four participants addressed concerns about underutilizing available human capital. P1 felt "middle-management is underutilized" in the decision making processes. P2, P4, and P5 wished managers could place more value on their employees, as P5

noticed "how valuable skilled labor is" and how quickly talent can be lost without

inclusion. ED1, ED2, ED3, and ED5 confirmed a loss of valued workers with multiple

layoff announcements while ED22 included employee comments of how leaders are

"underdeveloped and undervalued," there was a "poor value of employees." Meanwhile,

the internal data did not include any supporting evidence. The data led to the perception

that some midlevel managers and other stakeholders may recognize this challenge but

leave questions if top business leaders agree.

With the challenge recognition, strategies are available to offset potential

downfalls. Harju and Hakanen (2016) recognized that workers displaced in roles or

having too little work can be some of the sources of employee disengagement.

Furthermore, when managers encourage personal mastery as suggested by the

organizational learning conceptual framework, their employees tend to be more engaged

in learning, collaboration, and achieving organizational goals (Hutasuhut et al., 2021). To

overcome the challenge of underutilizing human capital, participants discussed using

training (i.e., P1, P2, P5, and P6) and cross-functional collaboration (i.e., P1–P5). All

participants also discussed listening to their employees and providing help as needed,

whether in resources, work guidance, or simply someone to talk to. P5 explained using

the strategy to build "relational engagement" to "add longevity to the employee."

Managers can include human capital in strategic planning to improve organizational

performance and limit employee disengagement.

Training opportunities can have a direct impact on developing human capital. The

internal data (e.g., ID1, ID2, ID4–ID11, ID15, ID16, and ID18) included encouragement

of training, while ED1 and ED22 were the only two external data documents with mentions of the topic. Concerning participant dialogues, P5 mentioned "there's a large drive for like LinkedIn, e-learnings, and things for people to get more involved." P2 discussed cross-training to "help lower some of the barriers" among departments. P6 summarized that managers should be "training the individual to be like you or better than you." Training can be formal or informal and involve mentorships or large groups to include an array of activities.

As discussed in the conceptual framework, Hussain et al. (2023) stated employees who receive training in learning organizations generate knowledge and new products faster for competitive advantages and improved company performance. Albrecht and Marty (2020) suggested that training and development programs can reduce employee turnover while increasing employee engagement and commitment. The data in this study shows the participants were aware of a potential impact of training and employee professional development.

All but one participant mentioned cross-functional collaboration, including activities such as cross-training and cross-departmental projects, which ID4, ID11, ID 20, and ID21 also incorporated. P3 described how managers "learn to work with other groups that you wouldn't even know existed as a technician," which P1 and P5 confirmed. P2 described a cross-training rotational program for graduates to "help lower some of the barriers just with their experience" and sharing those experiences with other departments. Interestingly, ED22 included an employee mentioning "a lack of collaboration through various departments" as managers tended to discontinue services before consulting their

users. No other external data documents had information to support claims suggested in ED22. Although business leaders may recognize the benefits of cross-functional collaboration, other stakeholders may not.

Midlevel managers following the conceptual framework may find that group learning in a learning organization's various departments can improve knowledge sharing, organizational functionality, strategy, culture, and systems (Hussain et al., 2023). Managers can also encourage collaboration in systems thinking to improve performance and innovation (Hassan & Basit, 2018). According to the collected information, several top-level and midlevel managers from the participating company may recognize the benefits of cross-functional work but not all employees within the firm may realize the impact of such activities.

### *Processes and Procedures*

Another topic within the theme of providing effective resource management included processes. Company leaders "have a process for everything," according to P1 who preferred checklists, reports, and an information management system that P2 also relied on. P4 and P6 discussed knowledge management, which Dahou et al. (2019) supported, and risk management processes. ID4, ID11, and ID12 had descriptions of continuous process improvement (Saad et al., 2020), learning cycles as mentioned in the organizational learning conceptual framework (Dahl & Irgens, 2022), and legal compliances. ID4, ID11, and ID12 also included support for operational excellence and effectiveness, which Dahou et al. (2019) defended. ED8 listed considerations of processes through a new product line. ED1 and ED3 included mentions of processes for

closures and reopenings while ED22 had suggestions to improve processes. The collected data included consensus of how managers and employees both utilize a variety of processes to complete routine work activities throughout the organization.

Human resources processes and procedures were prominent in all forms of collected data. All participants except P6 mentioned human resources as a resource for employees, especially through the two designated digital platforms Workday and SharePoint. P1 described Workday as a software system "where timecards are kept," along with "payroll," "payslips," as well as "goals and objectives." P4 elaborated SharePoint housed "all policies and procedures." In ID1, ID4, ID11, ID12, and ID14 were in-depth descriptions of human resources procedures and guidelines laid out for all employees to follow. The external data resonated how human resources approach a variety of topics within the organization, from employee incentives of retirement, reimbursements, and time off (e.g., ED20, ED21, and ED22). The external data also included statements to address turnover from the consolidation of regions (ED6), and layoffs at manufacturing plants (e.g., ED1, ED2 and ED3). Based on the data, company managers and employees understand the company's human resources processes and procedures and use them on a routine basis.

With the acknowledgment of human resources processes and procedures comes the question of whether they can be strategically used to improve performance. Gider et al. (2019) explained the benefits of human resources managers' strategies and how they improve work environments and employee performance. P2 provided an example of developing smart goals and P4 elaborated how such strategies help determine employee

performance ratings. Tiwari et al. (2015) noted how managers can use human resources to align departments with conceptual framework organizational learning strategies, such as shared visions and encouraged innovation. The collected data comprised of strategies of how some managers utilize human resources procedures to improve employee performance.

## Applications to Professional Practice

Company leaders who use organizational engagement strategies have a competitive advantage in their industry. For example, leaders tend to view the organizational structure from a different perspective that avoids siloed departmental work and allows grassroots ideas instead of following only hierarchical direction. The collected data led to the emerging themes of building a positive organizational culture and providing effective resource management. The subthemes of building a positive organizational culture included organizational decision making, employee engagement, and improvement opportunities analysis. The subthemes of providing effective resource management include technological resources, human capital, and processes and procedures. Each theme and subtheme are applicable in various professional settings and if used, managers could see improvements throughout an organizational structure.

In the theme of building a positive organizational culture, employee motivation is the essence of building organizational performance. All participants recognized how their encouragement promoted their employees' success and ultimately better performance for their departments and the organization. The data led to the conclusion that motivated employees have a stronger commitment to the organization both in tenure and the

willingness to help others. This motivation can help create competitive advantages within organizational and firm performance.

Within the subthemes of building a positive organizational culture, the data revealed how the combination of company, departmental, and individual goals set targets toward organizational performance. The combination can be a balance between structured guidance and employee engagement. Participants recognized the challenge of navigating through different departmental goals but countered with collaboration. Employee engagement can also include a variety of other incentives (i.e., monetary, promotional, and time off) and team-building exercises to combat employee disengagement and potential turnover. With the subtheme of improvement opportunities analysis, data revealed how managers frequently check the progress toward enhanced performance and evaluate any changes that could better the organization. These strategies can lead to cohesion, collaboration, and engagement that can improve both individual and organizational performance.

Managers also support organizational engagement by providing effective resource management to improve organizational performance. The data revealed how employees having the right tools with adequate training can improve individual performance. Barriers can include employees not using available resources and managers underutilizing human capital. Technological and knowledge management advantages rely on the proficiencies of effective resource management to make an impact on organizational performance.

The subthemes of providing effective resource management entails the tools of technology, human capital, and processes and procedures. Technology is essential in long-distance businesses and different types of work. Most large organizations rely heavily on different platforms to communicate throughout the companies, driving knowledge management. The data revealed a key to providing technology is to ensure employees have the capabilities to utilize available tools, which participants warned could be neglected in implementation. Just as technology can help improve knowledge management, so can utilizing human capital. While displaced workers can cause disengagement, promoting training and cross-functional collaboration can help strengthen employee skills and transform tacit knowledge to explicit information. Processes and procedures can help organize employee interactions through knowledge management, risk management, and human resources management. The efficiencies that can be added through developed processes and procedures can improve work environments, employee performance, and ultimately organizational performance.

Each component discovered in the emerging themes of building a positive organizational culture and providing effective resource management falls within the conceptual framework. Within the scope of organizational learning (Cangelosi & Dill, 1965), building a positive organizational culture with providing effective resource management suits the theory that managers should encourage constant improvements to build a stronger future (Senge, 2006). The combination of a stronger company climate and ample resources builds long-term sustainment for any organization.

The collected data supported the organizational learning conceptual framework that managers who think of the entire business cycle process to tie personal development to the shared visions of the organization, which Senge (2006) and Haile and Tüzüner (2022) discussed. As participants supported employees to obtain personal development, they concurred with the conceptual framework that encouraging employees can create a positive mindset, which Hutasuhut (2021) also discussed. Healthy positive environments can build innovation, diversity, and cohesion that promotes teamwork and further encouragement, as supported by Moreau (2020). Managers who remember the big picture while orchestrating details and including others can develop a regenerating cycle that establishes ownership and commitment throughout the entire organization.

Business leaders could use the findings of this study to identify organizational engagement strategies that improve organizational performance with a more collaborative and committed workforce. The data led to the conclusion that business leaders who combine the advantages of a positive organizational culture and effective resource management see a direct impact on organizational performance. Lunn et al. (2021) expressed how while resources and leadership influence can improve performance separately, combining the two can yield greater benefits for all stakeholders. Oesterreich et al. (2022) confirmed the conclusion and added the positive impact on firm profitability. Company decision makers can realize direct impacts among organizational engagement strategies and financial and nonfinancial advantages that build long-term sustainability.

**Implications for Social Change**

With higher levels of organizational engagement, employees can realize a better work environment through better resources and human relations. Employees benefit from a healthy work environment and ongoing support (Gider, 2019), which reduces turnover and develops stability (Rai & Maheshwari, 2021). Organizational engagement strategies can also lead to an increase in wages along with improved self-esteem and health of employees (Delbahari et al. 2019). Employees see better jobs with enjoyable work, higher salaries, stability, and health benefits.

Different industry sectors demonstrate a variety of other results as organizational engagement strategies impact stakeholders and consumers. Customers across most sectors see enhanced product quality and reduced waiting times (Wartari et al., 2021) and higher satisfaction (Manoharan & Singal, 2019), which increases consumer loyalty (Delbahari et al., 2019). Consumers can see improvement in their personal wellbeing which can expand to local, regional or extended communities' mental and physical health. For example, Lunn et al. (2021) discussed how 60 hospital CEOs expanded organizational engagement strategies to all employees instead of just clinical staff and found enhanced patient care. Business leaders who use organizational engagement strategies may see positive external impacts beyond employee benefits to impact consumers and surrounding communities.

**Recommendations for Action**

While the participating company leaders were strong in implementing their organizational engagement strategies, I would recommend a few actions to strengthen

their organization even more. For instance, with the scope of organizational learning (Cangelosi & Dill, 1965) the participating company faced challenges in developing mental models. The findings of this study showed participants recognized departmental differences, the inconsistencies of defining managerial success, and underutilizing available human capital. Participants discussed overcoming the challenges with employee engagement, communication, and collaboration. Managers who narrow the gap between individual and collective mental models see improvement in team performance (Tesler et al., 2018). Midlevel managers leaders could work to improve mental models by further developing departmental goals and intrapersonal relations with their employees, as there was very little recognition of either topic within the secondary data. Business leaders can also improve mental models at the organizational level (De Graaf, 2019). Top managers could assist in this venture with the recognition of mental model activities and their impact on the entire organization. Since Senge (2006) presented the mental models as a component of organizational learning, business leaders have continued to see implementations improve innovation, diversity, and cohesion (Moreau, 2020). The participating company's managers could strengthen their organizational performance in the same way.

Business leaders within the organization could also improve the recognized barriers participants mentioned within two more subtopics of organizational learning: systems thinking (i.e., resources) and personal mastery (i.e., human capital). When business leaders understand how individual actions can impact an organization's goals (Tkalac Verčič & Men, 2023), managers can address multidisciplinary problems

(Kordova et al., 2018). Meanwhile, managers who see personal mastery benefits as advancements encourage innovation and higher skill sets that benefit the organization (Soomro et al., 2020). Business leaders can utilize systems thinking with personal mastery skills by recognizing improvement opportunities for both individual and departmental performance that can improve organizational performance.

Managers at the participating company could also focus on building a shared vision (i.e., employee engagement) and team learning. Business leaders can reduce turnover with work engagement and job characteristics (Rai & Maheshawari, 2021), as employees become more involved with collaborated knowledge (Sun et al., 2019). Collaboration leads to team learning as teams gain more expertise and higher performance levels than individual growth (Chamtitigul & Li, 2021). Business leaders use collaboration to create knowledge-sharing and teamwork that benefits individuals, departments, and organizational performance.

Other organizational leaders could benefit from the study findings, which includes the two successful organizational engagement strategies of building a positive organizational culture and providing effective resource management. Business leaders have found notable improvements in organizational performance because of these strategies, which can develop competitive advantages for any company. Advantages can include reduced employee retention, higher-skilled employees, and increased productivity, along with improved wages, employee self-esteem, and staff health (Delbahari et al., 2019). Additional benefits may include innovation, collaboration, and a positive work environment that creates organizational sustainability (Adekanmbi &

Ukpere, 2021). I might disseminate the results of this study by conducting training, conferences, presentations, and seminars for business leaders who are looking to improve organizational engagement strategies. I might also share information through academic and business journals.

## Recommendations for Further Research

I noticed several limitations while collecting data for this study. Concerning the primary data, only a small sample of midlevel managers participated in the interview process, which Ellis and Levy (2009) warned may not represent the company holistically. Meanwhile, more secondary data could have assisted in eliminating primary data limitations and building more credibility (see Abdalla et al., 2018). Further research could include more participation, other forms of secondary data, and consideration of other types of methodologies.

With this exploration of organizational engagement strategies, a quantitative study is now an opportunity for further research. As a quantitative approach requires evaluating the similarities or differences of variables (Dawadi et al., 2021), further research could include the independent variables of building a positive organizational culture and providing effective resource management with a dependent variable of either organizational engagement or organizational performance. With this type of study, a researcher could use surveys and random sampling to gain more internal data from the organization (Yin, 2017). I believe it is still unclear the exact impact and relationships among the identified variables, which a researcher could explain the correlations within a quantitative study.

Some detailed discussions revealed by participants could be included in further research. Participants brought to my attention the challenges among departmental goals, including constraints in the budget, supply chain, and labor as well as overloaded employees. Some topics could include some of the negative impacts and more of how to overcome them, including employee disengagement, ineffective decision making, retention, and manager and employee relations. Other challenges in consideration are employees' job demands and how they may relate to the challenges of organizational engagement.

## Reflections

The purpose of this study had a deep meaning for me, as I had once been a midlevel manager and understood several frustrations and challenges. I avoided my personal biases (see Abdalla et al., 2018), and I chose an industry where I no longer had strong ties and an organization where I did not know any employees. I worked hard to avoid interjecting my personal opinions, especially during the interview and data analyzation processes (see Azevedo et al., 2017; Fusch & Ness, 2015). Although I saw the initial benefits of organizational engagement when I first learned of the term. I constantly questioned and self-reflected on my personal biases along the way (see Cypress, 2017). Throughout the journey, I allowed the research to guide conclusions.

I hope this process also gave some positive insight to participants. All participants appreciated the opportunity to interview, and some mentioned the experience brought new considerations to them. I did not provide a monetary incentive for participants' time. However, I hope they have realized the educational and community benefits of this

process. I can merely thank them for their much-appreciated time and enlightening conversations.

My change of thinking only brought more questions and a yearning for more information. After the interview process, I discovered that I neglected to consider the type of work environment within an organizational structure. From most of the academic literature, I saw examples of office practices (see Tay & Aw, 2021) or manufacturing environments (see Sookdeo, 2021). I understood the knowledge-sharing differences among subsidiary locations and global headquarters (see Velinov & Gueldenberg, 2016). However, some of the participants discussed traveling workloads in maintenance. With this concept into account, participants identified more challenges in technology and communications that would not occur in a centralized location environment. Participants' insight on their lifestyle impacted my view that organizational engagement can have an even stronger need in different sections than originally thought. I learned from this example alone that the research may never be fully complete as businesses and consumer demands continue to change and evolve, creating additional needs for adaptability.

**Conclusion**

The purpose of this qualitative single-case study was to explore how midlevel managers use organizational engagement strategies to improve organizational performance. I interviewed participants within the participating company, conducted member checking interviews, and reviewed company documentation and external information to meet triangulation. The findings of this study revealed two emerging themes of organizational engagement, which were building a positive organizational

culture and providing effective resource management, both of which are essential to organizational performance.

There are a multitude of benefits and proof that organizational engagement impacts organizational performance. Building a positive organizational culture and providing effective resource management directly impacts organizational engagement and performance. Managers can create positivity that cultivates employee's creativity, feedback, and motivation. Leaders who use a positive business culture can spur continuous improvements, better performance, and profitability. Managers who use organizational engagement strategies have great potential to see a variety of benefits to strengthen their company's performance and profitability.

Organizational engagement strategies do not come without challenges to overcome per participants' discussions. The top leadership of an organization may determine the available resources, which may or may not suit all levels of business needs. Participants explained that midlevel managers reflect the efforts and mentalities between top leadership and their employees. Participants discussed their individual discoveries that when they share with subordinates their personal caring and work standards, employees become more engaged and loyal to the organization. Managers also revealed how they must utilize the human capital resources available and avoid the downfalls of conflicting priorities within an organizational structure. As some business leaders encourage team learning and professional development, managers can collaborate across departments and levels to improve organizational performance. Positive work

environments, team building, and leadership are necessities for the success of these strategies.

The takeaway from this doctoral study for any manager is how to create a positive work environment and provide adequate resources. Like Senge's (2006) analogy of a jazz ensemble, managers must recognize the human capital of each employee and understand how to orchestrate the components to develop the masterpiece within the organization. This study revealed rewards from collaboration, teamwork, and knowledge sharing to impact organizational engagement. By providing a supportive environment throughout an entire organization, managers and employees only benefit from the ability to help each other at all levels of the organization.

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Appendix A: Interview Protocol

I will conduct interviews with at least six midlevel managers who meet the following criteria: (a) at least 18 years of age, (b) managing at least two employees in a business unit, (c) experience with organizational engagement. Other potential participants may include other midlevel managers within the organization.

I will follow the below steps during each interview:

1. At the opening of the interview, I will begin with introductions and thank the participant for their provided time.

2. The participants should have read the consent form and given their consent to participate. I will provide a hard copy of the consent letter for their records.

3. I will reiterate that the process is confidential and personal information will be excluded from the study. I will refer to an alphanumeric reference of the participant in the interview and on the transcribed information to ensure confidentiality.

4. I will remind the participant that the interview will be recorded, and the participant will have the opportunity for member checking to ensure accuracy. After the interview, the next steps will be discussed to ensure this opportunity.

5. Participants will have allotted time to answer all questions. The interview can cease at any time based on the participant's wishes.

6. At the end of the interview, I will politely ask if the participant would like to suggest other potential participants for the study, which is not a requirement.

7. I will schedule time for the participant to meet for a member checking interview.

8. I will end the interview by thanking the participant for their valuable contribution.

Appendix B: Company Invitation

Dear Executive:

My name is Joni Hoxsey, and I am a doctoral candidate at Walden University in the Doctor of Business Administration program. I am working on a doctoral study exploring how midlevel managers in the energy industry in projects within the midwestern and southern regions of the United States have used organizational engagement strategies to increase organizational performance. As defined in my study, firm performance is simply the ability to use company resources in an efficient and effective manner. The approval number from Walden University to conduct this study is 11-18-20-0663294 and expires on February 15, 2023.

This is a case study where I am looking to conduct online or phone interviews with a minimum of six midlevel managers who have implemented at least one organizational engagement strategy.

The participants will be voluntary and can withdraw at any time, even after I complete data collection. The identity of the participants will remain confidential, and I will not publish or disclose individual responses. I will audio record and write down individual responses for transcription purposes only. My study will be supervised by a Walden adjunct faculty member Dr. John Hannon, who should you need can respond to any questions you might have also.

To further assist the study, I would also like to ask for the release of company documents that may serve as secondary data. Such documents could be as simple as your vision and mission statements or similar documents that show how you encourage organizational engagement.

I sincerely hope you will agree to participate, and if so, the next step will be to review and sign the attached agreement and return it to me. If you have any questions, please feel free to call me or send an email. I will be happy to answer any questions you may have.

Thank you for your time and study participation consideration.

Sincerely,


Joni Hoxsey, MBA
Doctoral Candidate
Doctor of Business Administration Program
Walden University

Appendix C: Letter of Agreed Participation

Date: _____

Ms. Joni Hoxsey
Walden University


Dear Ms. Hoxsey:

After reviewing your research proposal, I grant you permission to conduct my organization study exploring how midlevel managers in the energy industry in projects within the midwestern and southern regions of the United States use organizational engagement strategies to increase organizational performance. I will assist you in obtaining employees within the organization that meets the criteria of being midlevel managers with successful experience using organizational engagement strategies that manage at least two employees in a business unit.

Individuals who choose to voluntarily participate will be protected in confidentiality and can withdraw their contribution at any time.

[Name:] _____, [Title:] _____ will help you gain access to the contact information via email of employees who meet the criteria of the study.

[Name:] _____, [Title:] _____ will help you gain access to the company documentation showing our organizational engagement strategies.


This organization can choose to withdraw from the study at any time and requests that the conducted research comply with all organizational policies. The data collected will remain confidential, and I will not disclose it to anyone except the student's faculty and staff without the permission of the company and the Walden University Institutional Review Board (IRB). Although raw data collected will not be shared with the company, the student will provide a summary of the results to the director for possible dissemination.

Sincerely,

Appendix D: Letter Requesting Document Release

Dear Company Representative:

My name is Joni Hoxsey, and I am a doctoral candidate at Walden University in the Doctor of Business Administration program. I am working on a doctoral study exploring how midlevel managers in the energy industry use organizational engagement strategies to increase profitability. The approval number from Walden University to conduct this study is 11-18-20-0663294 and expires on February 15, 2023.

An executive at your organization has agreed to company participation in my case study exploring organizational engagement strategies and directed me to contact you concerning internal documents that could assist the study. Following the executive's permission to release company documents, I am requesting your permission to use and reproduce organizational engagement documents with the following conditions:

- All documents released to me will be for my sole accessibility. I will not disclose or discuss any confidential data with others, including friends and family members.
- All documents are confidential. I will not disclose, copy, release, sell, loan, alter, or destroy data except with your specific authorization.
- I will not discuss confidential data where others may discover their contents. It is unacceptable to discuss confidential data, even if the documents do not include the participants' names.
- I will not initiate transmissions, inquiries, altercations, or the eradication of confidential information.
- My participation in this agreement will continue after the completion of my study.
- I understand any violation of this agreement may have legal implications.

If you agree to these terms, please email me the attached consent form providing written approval of the use of internal documents concerning your company's organizational engagement strategies. If you have any questions or concerns, please contact me via phone or email. Thank you for your time and consideration in granting this assistance for my study within your organization.

Sincerely,

Joni Hoxsey, MBA
Doctoral Candidate
Doctor of Business Administration Program
Walden University

Appendix E: Letter of Agreed Document Release


Date: _____

Ms. Joni Hoxsey
Walden University


Dear Ms. Hoxsey:

Thank you for contacting me concerning the release of internal documentation
concerning my company's organizational engagement strategies. After reviewing the
proposed agreement, I agree with your proposed terms of the agreement.

I agree to release the Organizational Engagement Strategies documents to you for your
sole and exclusive use in your Doctor of Business Administration qualitative single case
research study at Walden University.

Sincerely,

Appendix F: Participant Invitation

Dear [Name]:

My name is Joni Hoxsey, and I am a current doctoral candidate at Walden University studying Business Administration. I would like to invite you to serve as a volunteer for a research study I am conducting focused on exploring organizational engagement strategies midlevel managers use in business departments to obtain full potential profitability. My research will include interviews with midlevel managers who have been successful with organizational engagement strategies. The study is confidential, and I will conceal all personal information.

In considering this opportunity, please review the attached consent form which includes detailed information about procedures to assist you in making this decision. The approval number from Walden University to conduct this study is 11-18-20-0663294 and expires on February 15, 2023. If agreeable, please note that I expect an interview to take no more than an hour of your time. I will audio-record the interview, and you will have an opportunity of member checking for accuracy before I include the data in the study.

If you have any questions, please do not hesitate to contact me either by phone or by email. Please call or email me at your earliest convenience to express your decision. If you would like to participate, please provide a preferred time to interview at the time of your decision. I appreciate your consideration in participating and your valuable time.

Sincerely,

Joni Hoxsey, MBA
Doctor of Business Administration Candidate
Walden University