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Strategies to Manage Business Process Outsourcing Initiatives

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Walden University

College of Management and Human Potential

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Zienisha Bailey-Grant

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the review committee have been made.

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Walden University
2025

Abstract

Strategies to Manage Business Process Outsourcing Initiatives

by

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MS, Walden University, 2012

BS, Suny Old Westbury, 2005

Doctoral Project Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

December 2025

Abstract

Organizations increasingly rely on business process outsourcing (BPO) to reduce costs, access specialized expertise, and improve efficiency; however, failure rates in BPO initiatives remain high, leading to financial loss, operational disruptions, and reduced competitiveness. Business leaders who lack effective strategies to manage outsourcing projects risk eroding customer satisfaction and organizational performance. Grounded in transaction cost economics and the resource-based view, the purpose of this qualitative single-case study was to explore strategies some business leaders used to successfully manage BPO initiatives. The participants included 10 senior managers from organizations in the southeastern United States who had demonstrated success in overseeing outsourcing projects. Data were collected through semistructured interviews and were analyzed using thematic analysis. Five major themes emerged: (a) vendor selection and onboarding, (b) vendor relationship management, (c) performance measurement and continuous assessment, (d) implementation frictions, and (e) leadership capabilities. A key recommendation for business leaders is to adopt structured governance frameworks that integrate performance measurement and proactive vendor relationship management to mitigate risks throughout the outsourcing lifecycle. The implications for positive social change include the potential for organizations to achieve greater efficiency, reduce resource waste, and foster economic growth by creating more sustainable employment opportunities and strengthening community development.

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Dedication

I dedicate this dissertation to my family, my foundation, and my greatest support system. To my mother, a psychiatric nurse practitioner, and my father, an engineer, I extend my gratitude for instilling in me the values of education, resilience, and perseverance.

To my husband, my loving and supportive partner of 27 years, I am deeply grateful for your unwavering encouragement, which has sustained me through every challenge. To my daughter, who is pursuing her dream of becoming an ophthalmologist at the University of Florida, may this accomplishment remind you that dedication and hard work make all things possible. To my eldest son, Sanjay Grant, who aspires to become an orthodontist, and to my youngest son, who dreams of following in his grandfather's footsteps as an engineer, I hope this achievement inspires you both to pursue your goals with confidence and determination.

I also dedicate this work to my mentor, Dr. Kamala Anandam, the 96-year-old founder of the American Association of University Women (AAUW). Your wisdom and encouragement have challenged me to grow and given me the courage to pursue this degree with determination.

Finally, I dedicate this dissertation to my cousin, Monique Bailey, my safe space and confidante, whose love and steadfast support have carried me throughout this doctoral journey.

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Section 1: Foundation of the Project

Managing business process outsourcing (BPO) requires an emphasis on governance, methods, technology, culture, people, and strategic alignment (Christiansson & Rentzhog, 2019). Although some organizations have realized the importance of BPO, they struggle with implementation due to a lack of understanding (Ejechi & Oshodin, 2019). Organizations must balance pursuing cost-saving initiatives to obtain sustainable performance through BPO while trying to innovate (Leo et al., 2022). The findings from Leo et al. (2022) confirmed conclusions from the existing literature regarding the need for proper management of BPO initiatives to ensure the success and effectiveness of outsourcing projects. Without appropriate strategies, organizations may face various challenges, such as miscommunication, poor vendor selection, and lack of performance monitoring, resulting in project delays, cost overruns, and ultimately, failure to achieve desired outcomes.

Background of the Problem

Executives and company leaders are under pressure from a fiercely competitive business climate, which motivates them to consider strategically improving their organizations' efficiency to stay competitive and profitable (Hulsbeck et al., 2018; Okhmatovskiy & Shin, 2019). One solution to enhance business efficiency is using BPO providers. BPO providers deliver services in the tech industry, healthcare sector, finance, and other industries with significant needs for business enhancement. Implementing BPO and establishing strategic innovation through outsourcing can be difficult. For businesses using such services, BPO comes with many hazards. Park (2020) referred to risk as a

factor that endangers the effectiveness of BPO initiatives. According to a 2016 global survey on third-party governance and risk management, 87% of businesses engaged in BPO have had operations disrupted by a third party, and 11% have had a vendor relationship fail (Park, 2020). Such incidents imply an element of risk, which is harmful to the reputation of organizations. The general business problem is that BPO is risky and can adversely affect the profitability of organizations, although organizations expect BPO providers to transform their businesses (Charles & Ochieng, 2023). With this high expectation, there is a risk that BPO providers may be unable to meet these expectations.

The capacity to accomplish strategic innovation through outsourcing engagements is positively impacted by superior relationships between BPO providers and organizational leaders because they allow BPO providers to learn about businesses (Oshri et al., 2015). Zhang et al. (2018) found that project management, social, and technological risks are to blame for the failure of BPO initiatives. Previous scholars have not established a link between maintaining excellent relations with BPO providers, minimizing risks, and achieving corporate success. The aim of this study is to provide leaders with strategies to improve organizational success.

Problem and Purpose

The specific business problem is that some executive leaders lack effective strategies to lead successful BPO initiatives. The purpose of this qualitative single case study was to explore the effective strategies that some executive leaders used to lead successful BPO initiatives.

Population and Sampling

The specific population for this study was business executive leaders who had managed successful business process outsourcing (BPO) initiatives in the southeastern United States. To ensure a comprehensive understanding of the strategies involved, data were collected through multiple forms, including semistructured interviews, organizational documents, and archival records. The data collection process provided a holistic view of the strategies employed by executive leaders in managing BPO initiatives.

The sample consisted of 10 senior managers from organizations in the southeastern United States who had demonstrated success in managing BPO projects. These participants were selected using purposive sampling techniques, based on the characteristics of the population most relevant to the study's focus. Each participant was interviewed for approximately 45–60 minutes, with the interviews serving as a primary data source. In addition to interviews, archival records and relevant organizational documents were reviewed to triangulate the findings and ensure the robustness of the data.

To be eligible to participate, individuals had to meet the following inclusion criteria: (a) they held an executive leadership position, such as CEO, CFO, or COO; (b) they had at least 5 years of experience as an executive leader; and (c) they had overseen and managed BPO initiatives during their tenure. This approach ensured that the data collected reflected the experiences and insights of leaders with significant expertise in BPO management. The data triangulation from these multiple sources provided a richer,

more nuanced understanding of the BPO strategies employed and their impact on organizational outcomes.

Nature of Project

I employed a qualitative methodology in this project. There are three types of methodologies: qualitative, mixed, and quantitative. Qualitative research seeks to understand social or human problems by developing a complex, holistic picture from participants' words and perspectives in natural settings (Creswell & Creswell, 2021). A qualitative approach was appropriate for this study because the research question required an in-depth exploration of executive leaders' strategies for successful BPO initiatives and enabled triangulation of semistructured interviews with organizational documents and archival records. Qualitative research relies heavily on interviewing, observing, and evaluating activities (Alase, 2021), making human subjects appropriate for this project.

The mixed-method approach is one that considers various points of view, perspectives, stances, and standpoints while incorporating both qualitative and quantitative approaches (Johnson et al., 2007). The mixed methods approach was inappropriate because hypothesis testing, which is essential for the quantitative element of a mixed methods project, was not required to evaluate the relationship between risk management techniques and organizational effectiveness using BPO. Quantitative research focuses on a social phenomenon or human issue empirically, while evaluating a theory of variables measured numerically and statistically to ascertain whether the theory could help to explain or predict the phenomenon under project (Yilmaz, 2013). The quantitative approach was inappropriate as this project did not involve measuring

relationships between variables or testing hypotheses. This project utilized a qualitative methodology that, in addition to interviews, involved examining interactions and processes in a real-world empirical setting.

I considered several research designs for this project. These included narrative design, phenomenology, and case study design. The aim of the narrative design type is to explore human experiences as they are represented in textual form (Riessman, 2022). By carefully examining people's interpretations of their experiences, the narrative research approach allows for the collection of rich and diverse data. This design type is more suited for studies that address social issues instead of business-related ones. Without any pre-established frameworks, phenomenological design enables the investigation of the phenomenon under project as truthfully as possible (Alase, 2021). Social and psychological data are collected from the viewpoints of those participating, serving as the foundation for data analysis. Although this design also focuses on people's experiences, it is more appropriate for a project that addresses a social or psychological issue (Alhazmi & Kaufmann, 2022). A case study is a research design that involves an in-depth examination of a single case or a small number of cases, often used to explore complex and nuanced phenomena (Merriam, 2009; R. K. Yin, 2009).

In a case study, the researcher collects data through various methods, such as interviews, observations, and document analysis, to gain a detailed understanding of the case(s) being studied. The case study design is often used to explore contemporary phenomena within a real-life context, allowing for an in-depth examination of the complex and dynamic relationships between variables (Yazan, 2021). This design is

particularly useful when the researcher is interested in exploring a unique or rare phenomenon or when the context is critical to understanding the phenomenon being studied (Creswell & Creswell, 2021). I used a single case study design to evaluate strategies leaders had utilized to enable successful BPO initiatives within their organizations. This design allowed for an in-depth examination of the specific practices and approaches used by executive leaders in leading BPO initiatives, which may have been unique to their organization or context. In this project, I collected data that enabled businesses to comprehend their existing standing and potentially modify their trajectories to promote the best management of BPO activities by merging theory and project findings.

Research Question

What strategies do executive leaders use to lead successful BPO initiatives?

Interview Questions

1. What leadership skills are important in BPO initiative implementation?
2. What strategies do you use to ensure risks are limited when engaging third-party service providers?
3. What strategies have you found to work the best?
4. How do you measure the success of these strategies?
5. What challenges have you experienced while implementing these strategies?
6. How do you believe these strategies could be improved?
7. What additional information would you like to share regarding strategies to improve BPO?

Theoretical Framework

Dynamic capabilities theory (DCT) and self-determination theory (SDT) provided the theoretical framework for this project. Teece (2022) developed DCT as an enhancement to the resource-based view and to provide a comprehensive overview of development strategies for adaptation while maintaining minimal capacity criteria to ensure competitive survival. DCT incorporates cooperation, innovation, and competition, all key components of the current global economy (Kapoor & Aggarwal, 2020). It is among the most widely accepted frameworks in outsourcing literature (Mehta et al., 2020). In the context of BPO initiatives, DCT can be applied by examining how executive leaders use their dynamic capabilities to reconfigure existing resources and competencies to respond to changes in market conditions or stakeholder expectations (Chirumalla, 2021). The theory is appropriate for this project since it entails learning, growth, and innovation. Outsourcing is increasingly viewed as a tool to explore new thinking in today's world, in addition to the operational efficiency that has historically been considered its primary advantage (Bag et al., 2020; Oshri et al., 2015). Dynamic capabilities allow for greater creativity, the pursuit of unique opportunities without assurance of success, the development of new skills, and the efficient coordination of internal and external resources to address and adapt to changing business conditions (Teece, 2016). DCT also supports significant innovation, the pursuit of uncommon possibilities without the promise of success, the development of new talents, and the effective coordination of internal and external resources (S. Gupta et al., 2020). Karimi-Alagheband and Rivard (2020) demonstrated that DCT was applicable in the BPO

context, highlighting the importance of dynamic capabilities in shaping the effectiveness of outsourcing initiatives. These qualities enable businesses to address and adapt to changing business situations. By applying the theory, executive leaders can gain a deeper understanding of the complex relationships between organizational resources, competencies, and environmental factors that influence the success of BPO initiatives. This understanding can inform strategic decisions about how to develop and leverage dynamic capabilities to drive competitive advantage in a rapidly changing business environment.

Dynamic capabilities theory aligns with this project because it provides a conceptual structure for understanding and enhancing the quality of outsourcing partnerships. BPO is a high-risk option, but when implemented with effective strategies based on the dynamic capabilities framework, firms can readily adjust to the changing environment and remain profitable and competitive. The theory can help solve inflexibility within firms and demonstrate how knowledge enables executive leaders to understand effective strategies for managing BPO service providers and initiatives. Through dynamic capabilities theory, it is possible to create new strategies for managing these partnerships. Executive leaders can use the theory to develop and pursue strategies to manage partnerships with third-party vendors.

According to Edward Deci and Richard Ryan, SDT was developed to propose that human behavior is driven by two types of motivation: intrinsic and extrinsic (Deci & Ryan, 2023). Intrinsic motivation is driven by internal factors, such as interest, enjoyment, and personal satisfaction, whereas extrinsic motivation is driven by external

factors, such as rewards, pressures, or social norms. Deci and Ryan (2023) posited that in SDT, when needs are met, individuals experience intrinsic motivation, which leads to enhanced well-being, performance, and creativity. Conversely, when these needs are not met, individuals may experience extrinsic motivation, which can lead to decreased motivation and well-being (Malinowska & Tokarz, 2020). SDT has been applied to various fields, including business and management. In the context of BPO, SDT can be used to understand how to motivate and engage employees in outsourcing initiatives (Chawla, 2020).

Operational Definitions

Back office: Internal business operations, such as finance, human resources, and accounting that may be outsourced (Shafiee & Emadi, 2020).

Business process outsourcing: An outsourcing subset in which companies contract the responsibilities and operations of a specific business activity to a vendor or a third-party service provider (Klochko et al., 2019).

Comprehensive BPO: An outsourcing approach in which the third-party vendor is chosen to manage an entire business process, such as administration, delivery, content, and/or technology (Ahamed & Haleem, 2020).

Contact center outsourcing: An outsourcing form in which an organization contracts traditional contact centers, such as chat, voice, or social media-based customer service, to an external vendor (Ivanova & Vodenova, 2019).

Front office: Organizational services characterized by direct customer interactions, such as sales, customer service, technical support, and marketing (Srivastav et al., 2019).

Legal process outsourcing: When businesses contract someone to handle their legal services (Mehta et al., 2020).

Nearshore: When a third-party vendor undertakes business services in a country neighboring a hiring company's home country (Shchepkina et al., 2019).

Offshore: An outsourcing action that occurs when a third-party vendor undertakes duties in a nation not bordering the country in which the contracting organization maintains its core business functions (Franco et al., 2021).

Onshore: An outsourcing event in which a vendor performs work in a nation similar to that of the customer's primary business operations (Asatiani et al., 2019).

Selective BPO: An outsourcing strategy in which the vendor is selected to manage some set of business processes but not all functional areas (Klochko et al., 2019).

Assumptions, Limitations, and Delimitations

Assumptions, limitations, and delimitations are common terminologies that researchers encounter. They all have implications for project outcomes, making it necessary to define them to prevent potential effects on the outcomes. Below is a discussion of each of the three.

Assumptions

Assumptions are beliefs or principles that are considered true but have not been proven (Poucher et al., 2020). One of the assumptions in this project was that leaders who

maintained a high-quality relationship with the BPO company to which they outsourced the BPO initiatives would achieve high success rates, as social risks would be minimized. Another assumption was that the BPO company employees would bring innovation when there was a high-quality relationship between them and the organization that outsourced to them.

Limitations

Limitations refer to potential weaknesses of the project that are out of one's control due to the research design, funding, and other constraints (Nayak & Singh, 2021). In practice, limitations refer to restrictions on the project that cannot be dismissed and may affect the results and conclusions. One limitation of this project was the small sample size, which may not represent the opinions of all executive leaders practicing BPO. Another limitation was the project's focus on one geographical area, which limited the ability to obtain insights from leaders in other locations and generalize the project's findings.

Delimitations

Delimitations are definitions that act as boundaries for a project (Akanle et al., 2020). This project's delimitations included the project objectives, research questions, theoretical framework, and the specific population chosen to help meet the project's purpose. These were delimitations in that they constrained me to adhere to them during the entire process.

Significance of Project

This project was designed to shed light on the significance of recognizing BPO as a high-risk strategy that can adversely affect profitability and competitive standing. By examining the potential consequences of BPO implementation, this research contributed to both business practice and social change, impacting a wide range of stakeholders.

Contribution to Business Practice

BPO relieves firms of managing resources, allowing them more time to concentrate on their businesses' most strategically important aspects. To manage the contractual agreement holistically and ensure the BPO initiative's success, the organization's management must establish a positive connection with their offshore counterparts. Ge et al. (2021) note that outsourcing advantages include delegating operations and cost-cutting because other businesses manage certain areas more effectively. Mehta et al. (2020) identify that various BPO risks and knowledge management capabilities should be combined to accomplish successful risk management. Because of its diminished proficiency, the interdependence of all activities, ongoing instability, poor merger and acquisition management, and erratic managerial conduct, BPO puts organizations at risk. Managers must receive proper training to manage their relationships with BPO providers effectively.

A Review of the Professional and Academic Literature

The purpose of this qualitative single case study was to explore strategies some executive leaders used to manage third-party service providers and lead successful BPO initiatives effectively. In the literature review section of the project, it was important to

analyze the existing literature thoroughly to compare and contrast previous findings on the topic. The major findings on specific strategies that business executives can use to manage outsourcing initiatives are a primary part of the review. Executives and company leaders are under pressure due to a fiercely competitive business climate, which motivates them to consider strategically improving their organizations' efficiency to stay competitive and profitable. One solution to enhance business efficiency is to use BPO providers. BPO providers deliver services in the tech industry, healthcare sector, finance, and other industries with significant needs for business enhancement (Mancini et al., 2021). BPO should be an asset to companies, necessitating strategies that can manage their initiatives to benefit their businesses. The section also contains links between the conclusions of various studies, and the general aims of this project.

The literature search involved different search engines to gather relevant information for the literature review. I took systematic steps when conducting searches and compiling pertinent data. Initially, I pinpointed the most crucial search terms, such as *BPO strategies*, *managing outsourcing initiatives*, and associated terms like *outsourcing*, *BPO*, *offshore outsourcing*, *BPO advantages*, and *BPO challenges*. These search phrases aided in searching relevant academic databases and conference proceedings for the project. It was necessary to use filters to narrow down the publication dates and peer-reviewed status to ensure reliable sources.

The literature review section contains recent academic peer-reviewed journal articles and older seminal papers, including reports from organizations. With insights from theoretical and practical viewpoints, this multidimensional approach offers a

thorough picture of management methods for BPO initiatives. The literature search method entailed using pertinent search terms, focusing results with Boolean operators, investigating citations, and considering various sources to thoroughly understand the tactics for managing BPO initiatives. The review involved searching for relevant peer-reviewed articles in recognized academic databases, such as JSTOR, PubMed, Google Scholar, and the Walden University Library. The search focused on articles published from 2020–2024, with the aim of discussing the most recent information regarding BPOs.

The inclusion criteria for the sources were (a) published in the English language, (b) peer-reviewed, (c) in full text, and (d) published between 2020 and 2024. The exclusion criteria were studies not published in English and articles unavailable in full text. The literature review section contains a discussion on the theoretical framework, search engines, and the review of the literature.

Theoretical Framework

The theoretical framework for the project served as a roadmap for understanding the relationship between dynamic capabilities and self-determination in the context of this project. This section includes the different perspectives that were used to understand the various concepts related to the major research questions in the project. The two theories that guided this project were dynamic capabilities theory and self-determination theory. DCT focuses on organizations' ability to adapt, whereas SDT addresses individuals' intrinsic motivation and autonomy in achieving their goals. Integrating these two theories helped shed light on how organizations can foster an environment that

promotes adaptive capabilities and employee motivation, ultimately leading to enhanced performance and success.

Dynamic Capabilities Theory

Dynamic capabilities theory was initially developed by Amy Shuen, Gary Pisano, and David Teece as a working paper. They later published the final peer-reviewed version of the paper, which they termed a theory, in 1997 (Teece, 2022). Dynamic capabilities refer to firms' responses to the need for change or new opportunities in the business environment. The changes to which businesses respond may take various forms, such as changes in operational processes, changes regarding the allocation of resources, and changes in the operations of the business. Dynamic capabilities permit organizations to respond to changes in the need to outsource some of their processes, making the theory relevant to the current project.

The ability to adapt quickly and to develop strategic assets is necessary for both businesses and employees. Mehta et al. (2020) argued that dynamic capabilities theory is appropriate because it offers information that guides firms on how to integrate, reconfigure, and build external and internal resources to respond to their changing business environments (Teece, 2022). Mehta et al. stated that the theory underscores the need for executive leaders to react in a timely manner and adequately to external changes by combining diverse capabilities. They also asserted that the theory encourages BPO adaptation as it offers information on how business leaders can achieve short-term and long-term competitiveness by seeking the services of external vendors with more knowledge of the business processes.

Companies' outsourcing improves internal cooperation and cohesiveness. Shafiee and Emadi (2020) contended that firms may employ outsourcing to achieve effective internal coordination, which enhances the ideas of dynamic capabilities theory. Even after the process is engineered, their method demands that senior leaders collect and analyze data that might improve customer experience. To comprehend how to boost corporate efficiency, cut wage expenses, and accomplish global development quickly, executives pursuing BPO must consider the dynamic capabilities of their components. Shafiee and Emadi noted that the dynamic capabilities framework supports organizations' resource-based perspectives by encouraging executives to take actions that raise the value of the company's resources even when outsourcing more professional services. Through the ideas of dynamic capabilities, managers may also learn how to modify their resources to stay competitive (Muhic & Bengtsson, 2021). Permanent staffing is costly, and the dynamic capabilities framework encourages leaders to reorganize their external competencies (outsourcing) to adapt to shifting environments. Dynamic capabilities may equip managers with skills on how to modify their resources to stay competitive.

Outsourcing fosters a competitive edge for the organization in the market. Shafiee and Emadi (2020) noted that BPO has helped companies maintain their competitive advantage in regional and global marketplaces in recent years, as outsourcing has evolved from a management fad to one of the most critical and strategic concerns facing modern businesses. Due to the complexity and unpredictability of the process's timing requirements, companies outsource certain operations as part of their business process to ensure their success. To achieve this success, businesses must have solid outsourced

management in place. Avoiding problems with the company outsourcing process requires making strategic judgments and selecting the appropriate organizational techniques.

Charles and Ochieng (2023) noted that outsourcing by taking advantage of significantly lower prices enhances companies' competitiveness, thus placing them at a competitive advantage. As a result, business leaders need to know where they stand with their companies and what aspects affect the outsourcing process to make the best decisions.

Outsourcing is cost-effective as it allows businesses to focus on core competencies while delegating noncore activities to specialized service providers. Zuhaira and Ahmad (2021) stated that managing BPO initiatives requires careful planning and implementation. Managing BPO initiatives requires a thorough assessment of the organization's current processes, identifying areas that can be effectively outsourced, and developing a clear strategy for outsourcing these functions. Managers need to use appropriate and efficient outsourcing methods when deciding on outsourcing strategies and selecting suppliers due to the complexity of the decision-making environment and the wide range of criteria involved. Outsourcing company processes may allow firms to save money. The optimization of resources by organizational leaders boosts productivity through innovations (Wamba-Taguimdje et al., 2020).

Fostering a culture of development among employees is essential for building a dynamic and resilient organization. Outsourcing can also provide access to specialized skills and expertise that may not be available within organizations (Sen et al., 2020), leading to improved product or service quality and increased market innovation and competitiveness. Specialized skills and expertise are accessible outside organizations,

leading to improved product or service quality and increased market innovation and competitiveness. In addition to accessing specialized skills and expertise, outsourcing can provide cost savings for organizations. By outsourcing noncore activities, companies can reduce the need to hire and train additional staff and avoid investing in infrastructure and equipment (Kossowska & Rosiński, 2024; Pereira et al., 2019). By partnering with external suppliers, companies can scale their operations up or down based on demand without significant capital investments or long-term commitments. This flexibility can help organizations adapt to changing market conditions and maintain a competitive edge.

Dynamic capabilities theory focuses on firms' ability to adapt and respond to environmental changes, which is crucial in BPO. Chakrabarti and Mukherjee (2022) explained that dynamic capabilities theory is well suited to the BPO sector due to its emphasis on flexibility, innovation, and competitive advantage (Ge et al., 2021). The framework can be used as a strategic lens in an industry in which companies outsource nonessential tasks to specialized service providers. Adaptable BPO companies can quickly adjust to new client requirements and market conditions. They can rapidly and effectively rearrange existing components to create new ones that better suit the needs of specific businesses and tasks. Artificial intelligence (AI) and automation are two examples of innovative technologies that could be incorporated to boost productivity (Leso et al., 2023). BPO partners can anticipate market shifts and provide novel offerings by encouraging a culture of lifelong learning and innovation. Because the BPO industry constantly evolves, dynamic capabilities theory can help businesses plan for disruptions and seize opportunities. Through this planning, BPO partners may combine their subject

knowledge with their technological prowess through cross-functional collaboration. These businesses can provide impressive client experiences by consistently improving their operating procedures. Overall, dynamic capabilities theory provides a robust foundation for BPO firms to innovate, succeed, and weather the storms of an unpredictable industry.

Self Determination Theory

The self-determination theory was first developed by Richard Ryan and Edward Deci in 1985 (Deci & Ryan, 2023). SDT posits that individuals have an inherent drive to shape their lives. The BPO workforce is also highly organized and proficient in learning new skills. Indicators of a learning organization's success, such as a culture of teaching and learning, a focus on results, and management encouraging growth, all average out to a high score. As a result, BPO workers in Region XI in the Philippines demonstrate strong learning organization characteristics. Open and fluid communication facilitates a two-way learning process in which staff are encouraged to ask questions and participate in discussions. When leaders promote growth, their teams can more effectively spot issues, share knowledge, and evaluate post-audit performance. Workers who feel appreciated contribute more to the company by participating in events, going above and beyond, and creating innovative solutions to issues (Narciso & Guhao, 2020).

BPO workers in Region XI frequently experience the manifestation of the organizational politics they perceive. Narciso and Guhao (2020) detailed how those in the middle of an organization's hierarchy can have considerable sway over their subordinates by doling out incentives and punishments and controlling access to information.

However, regular workers have little say in their daily operations and much less protection against termination because not all of them are guaranteed job stability. Another factor is that BPO workers have a high rate of job satisfaction. The highest means were found for factors, such as remuneration, advancement prospects, workplace support, a feeling of accomplishment on the job, contentment with superiors, and support from coworkers, all of which contribute to a highly satisfying work experience. The conclusion was that the Region XI BPO workforce consistently exhibited high levels of job satisfaction.

This finding supports the argument made by Chawla (2020), who asserted that teamwork is crucial to sustaining both individual and group output and that top-level management can play a significant role in fostering a productive workplace by providing employees with the resources they require and instituting programs designed to strengthen ties between workers. Based on the statistical analysis, there is a significant positive correlation between psychological empowerment and work satisfaction.

Strategies to Manage Business Process Outsourcing Initiatives

Optimization of Knowledge Management Processes

Improving knowledge management leads to better management of business process initiatives. Di Vaio et al. (2021) pointed out that having a proper knowledge management system is crucial for enabling BPO providers in two significant areas. When knowledge management systems are optimized, BPO-related elements, such as service-level agreements, statements of work, and contracts are used. The effect is that the necessary documentation is delivered as expected. Optimizing the knowledge

management process also ensures that the required documents are easily accessible to all stakeholders within the organization.

With access to this knowledge, BPO providers can hire and maintain a high level of performance. Sobczak and Ziora (2021) affirmed that another benefit knowledge management processes offer to BPO providers is that they store documentation related to workflow, customer relations, and the overall approach that teams have regarding the partnerships within the organization. Chawla (2020) noted that through outsourcing, businesses hire and retain competent employees, which enhances the overall performance of the workforce. These are essential requirements for BPO providers. With open access to the information the knowledge management system offers, firms and outsourcing partners are better positioned to get ahead of their competitors.

Business process outsourcing enhances organizational performance. Ouriques et al. (2019) explained that as part of effectively managing knowledge management systems for BPO partners, firms must find such solutions through their knowledge base software. Chatterjee et al. (2024) noted that firms must identify and implement knowledge base software solutions that facilitate seamless communication. This communication not only enhances the overall quality of work but also enables organizations to adapt quickly to changing market conditions and customer needs. Knowledge base software is a significant part of knowledge management systems. With a knowledge base, a firm is in a better position to organize and share vital information with its outsourced teams to ensure business functions operate efficiently (Migdadi, 2021). Optimizing knowledge management leads to better control of business process initiatives.

Information Gathering. The optimization of knowledge management processes can take place in various ways. Voorberg et al. (2021) pointed out that it is possible to optimize knowledge management by gathering or collecting information and initiating the knowledge management process by proactively seeking firms' relevant data. Firms would focus on the information that holds the highest value concerning the business processes to be outsourced. They would ensure that they spearhead the search for information to facilitate the process. Only the most relevant information is gathered so that the synthesis of data benefits the partners who support the firm in its outsourced operations. Firms can gather information by engaging employees in knowledge-sharing interviews, workshops, and sessions that help capture their tacit knowledge (Rice & Reeves, 2023). Firms can also empower dedicated teams in the gathering, documentation, and use of such information for the organization's overall benefit. González-Briones et al. (2018) affirmed that the gathering of data can foster a collaborative culture of open communication so that BPO partners have all the knowledge they need to carry out their activities. Hailu and Chebo (2024) highlighted that firms further enhance the benefits of BPO by empowering dedicated teams to gather, document, and utilize information effectively. Gathering data enables firms to identify areas for process improvements, streamline operations, and optimize resources, ultimately driving increased efficiency and productivity.

Organizing Information. This is a way of optimizing knowledge in an organization. Kannampallil et al. (2013) stated that firms endeavor to organize gathered data systematically using a well-structured taxonomy. The taxonomy is based on the

firm's objectives, enhancing the synthesis of only the most relevant pieces of information. Firms can leverage technology, such as machine learning and artificial intelligence (AI) tools to automate the categorization of available data. Jha et al. (2020) indicated that the use of technology aided in AI hiring in a competitive business environment by using the right information. These tools enable firms to make their information more accessible and actionable for both employees and BPO partners.

Summarizing Information. The data the firm gathers can also be optimized through summarization. Rukmana et al. (2023) noted that summarization of information is simply transforming the gathered information into easily digestible content. The key points of the collected data help firms identify the specific areas in which the information is applicable. The team tasked with gathering and summarizing information can use appealing infographics, interactive dashboards, or charts to present the information in an engaging and meaningful manner. Hatamlah et al. (2023) indicated that data mining and statistical analysis provide insights through big data that facilitate demand planning and production. Presenting information in such a way ensures that all relevant stakeholders, including outsourced teams, can quickly and efficiently grasp the essence of the shared knowledge.

Analyzing Information. Information can be optimized through various analysis techniques. Blank and Deb (2020) found that in such analyses, firms delved deeply into the summarized information to uncover hidden patterns. These analyses also enabled firms to uncover potential implications and identify relationships between pieces of information. As Pererva et al. (2021) suggested, using systemic analysis to optimize

production through indirect outsourcing of information technology enhances economic outcomes for businesses. During the analysis of information, firms may have opted for advanced analytic tools to evaluate data gathered from multiple sources to generate comprehensive reports.

Companies should identify and leverage their core competencies. Culot et al. (2020) posited that firms involve experts on the different topics they analyze. These experts provide relevant insights and context for management, particularly regarding the type of information that outsourcing partners need. These experts can also ensure that management and other stakeholders fully understand the findings from the collected data. Chopra et al. (2022) stated that enterprise resource planning, through effective data mining and transmission, improved business operations by increasing production. Such findings may help enhance collaboration among the different departments involved in outsourced processes.

Synthesizing Information. Knowledge in the firm can be optimized through the synthesis of gathered information. Steininger et al. (2022) noted that the synthesis of information is the process by which firms turn analyzed data into actionable knowledge. This process may involve integrating insights from multiple reports. Firms can also synthesize the information available by identifying opportunities that can create competitive advantages and strengthen productivity. This synthesis of information can also help firms foster innovation that is instrumental in achieving their strategic goals. Wipulanusat et al. (2021) pointed out that the synthesis of information can encourage cross-departmental collaboration by sharing knowledge across internal teams. Such

partnerships may enable each department to stay updated on the requirements for use across processes. Firms can also leverage knowledge-based software to create a knowledge repository accessible to everyone. Additionally, firms can implement features, such as search functionalities, user access management, and version control to facilitate effective information collaboration.

Decision Making. The decision-making process can also help to optimize knowledge. Settembre-Blundo et al. (2021) suggested that the decision-making process enables firms to act on available information to achieve their goals. According to Poletto et al. (2020), decision making within the organization, after optimizing knowledge, must be maximized to meet the objectives of the business. The decision-making process results from the entire function of knowledge optimization. It is the primary reason firms gather data. Through decision making, firms can harness the power of their actionable knowledge. Harnessing expertise enables firms to make data-driven decisions to enhance the optimization of resource allocation. Additionally, through the decision-making process, firms assess the applicability and relevance of their knowledge to various departments, tasks, and projects within their organizations.

Executive Leadership in BPO Success. Executives are critical to the success of any BPO program. Their strategic decisions determine the scope, objectives, and chosen vendors. Effective leadership that maximizes cost savings, efficiency, and quality ensures that BPO goals align with companies' overarching strategies (Rahman et al., 2021). To accomplish this, executives create efficient lines of communication, manage their partnerships with outsourcing companies, and monitor key performance indicators.

Shafiee and Emadi (2020) investigated the impacts of business leaders in BPO by examining leaders in dairy plants. These leaders were vital in their ability and readiness to strengthen BPO. Leaders in the business world are responsible for guiding their teams through transformations and building an environment in which internal teams work well with external vendors. Their foresight and direction significantly impact how profitable and transformative BPO initiatives become.

By converting fixed expenses into variable costs, senior leaders' commitment to BPO allows firms to enjoy lower prices. Business executives may eliminate nonessential organizational processes via outsourcing, concentrate management attention, seek expert services, and gain better IT capacities, leading to continuous improvement and reduced error rates (Rahman et al., 2021). Shchepkina et al. (2019) supported the benefits of BPO. Shafiee and Emadi (2020) indicated that outsourcing creates efficiency in core departments, such as accounting, human resource management, and general transfer of business processes through optimized task delegation to third-party vendors.

Overcoming Cultural Challenges in BPO. The lack of investment in cultural programs by organizations negatively impacts BPO. Khan et al. (2022) explained that outsourcing arrangements frequently face difficulties in communication and cultural understanding. Organizations should invest in cross-cultural training programs to enhance cultural awareness and promote effective collaboration between teams from different backgrounds. By implementing these strategies, businesses can overcome communication and cultural barriers, ensuring smooth and successful BPO experiences (Puyod & Charoensukmongkol, 2019). These challenges can hinder the effectiveness of BPO and

impact the overall success of outsourcing relationships. To address these issues, organizations must employ various strategies to manage BPO effectively. One such strategy is establishing clear communication channels and protocols between the outsourcing partner and the organization. This includes regular meetings, video conferences, and utilizing technology tools for seamless communication. Additionally, organizations should invest in cross-cultural training programs to enhance cultural understanding and promote effective collaboration between teams from different backgrounds. By implementing these strategies, businesses can overcome communication and cultural barriers, ensuring a smooth and successful BPO experience.

Collaboration with Different Stakeholders in the Global Market. When outsourcing, it is common to work with partners in other time zones, with different native languages, and from other cultural backgrounds (Van Looy, 2021). Some forms of cultural differences can lead to disagreements, setbacks, and ineffectiveness in a project's execution. Communication difficulties due to language issues can result in misunderstandings and mismatched expectations. Workplace culture can also affect collaboration, decision-making, and problem-solving styles (Dana et al., 2021). To overcome these obstacles, it is essential to strengthen lines of communication between all parties involved to encourage mutual respect and appreciation of one another's cultures. Clear communication protocols, regular updates, and cultural awareness training are recommended to assist in bridging these gaps, improving collaboration, and lessening the adverse effects of communication and cultural differences on outsourced projects.

It is necessary to incorporate strategies to enhance organizations' operations and business needs. Hindarto (2023) stated that one way to enhance the decision-making process is to incorporate the agile approach to help implement actionable information. The agile approach allows for iterative improvements based on received feedback and changing circumstances in the environment. The end result is that the organization can adapt swiftly to ever-changing market conditions while maintaining a competitive edge in the dynamic business landscape. Tripathi et al. (2021) affirmed that by working through all the processes of knowledge management leading to the decision-making phase, the firm creates an actionable and engaging system that fosters ongoing innovation, learning, and growth for the overall benefit of the organization.

Defining the Goals of the Business

Defining business goals leads to better management of business process initiatives. Gray et al. (2020) posited that firms should have clearly defined reasons to justify their decisions before outsourcing. Firms' outsourcing goals should align with the benefits the outsourcing plans will bring to the organization at large, both in the short term and in the long run. Le Ludec et al. (2023) affirmed that understanding the goals for outsourcing is only the start of the whole process. To make effective outsourcing decisions, firms should move beyond simply defining the reasons for contracting out. They must also define the rationale for focusing on specific outsourcing goals. Suppose a firm aims to reduce the overall costs associated with performing the function internally. In that case, managers will need to determine how to reinvest the savings generated by the outsourcing initiative.

Empirical analysis further identifies that senior managers' expectations regarding the benefits of outsourcing are a significant factor in determining which processes are outsourced. Rahman et al. (2021) demonstrated the need for extra caution when employing arguments that emphasize fundamental competencies in a BPO setting. Asatiani et al. (2019) found a positive correlation between the extent of outsourcing and factors, such as lower costs and increased emphasis on core competencies and business process improvements. Their conclusion suggests a heightened level of selectiveness for businesses seeking to gain external expertise through outsourcing. These organizations often outsource only a few processes within particular company functions. This work's primary theoretical contribution is its recognition of the dynamic nature of outsourcing incentives.

As firms increasingly outsource their business activities, some incentive factors gain prominence, while others diminish in significance. The four process groups, sales, purchases, payroll, and payments, demonstrated consistent motivations across all seven motivation factors (Asatiani et al., 2019). However, according to Asatiani et al.'s (2019) findings, the fifth process group (reporting) was driven by the desire to acquire specialized expertise. Other researchers, such as Franco et al. (2021), investigated the connection between BPO and organizational efficacy. Franco et al. found that for leaders to benefit from BPO, they must consider transaction costs, how these costs affect resources, and the coordination required among the partners involved in the organization. Determining how to prioritize those perspectives leads to performance efficiency and increased organizational success.

In today's economic landscape, outsourcing has had a particularly profound effect on the accounting sector. Ilham et al. (2022) examined the benefits of outsourcing and found that they include reduced operational costs and the delivery of cost-effective, professional, and expert services. Saving money is undeniably one of the most attractive advantages of accounting outsourcing. Data entry, bookkeeping, and payroll processing are just a few examples of routine operations that firms can outsource for significant cost savings. Companies can take advantage of economies of scale through outsourcing because service providers are located in regions with lower labor costs. The expenses associated with hiring, training, and supporting an in-house accounting team are thereby reduced.

The money saved can be put toward growth-promoting strategic projects, new products, and employee training. Ilham et al. (2022) cited increased professional and expert services in the human resources department, where outsourcing brings flexibility and reliability to infrastructure, resulting in competent business value. Ilham et al. also argued that outsourcing promotes the attainment of business goals and prospects relevant to excellent readability and transferability. Charles and Ochieng (2023) identified that BPO enables businesses to achieve high control over their functions due to competencies from integrating unique technology and skills that improve efficacy. Keeping up with accounting standards and compliance requirements in an ever-changing regulatory landscape is challenging. Outsourcing can serve as a guiding light in these situations. In-house accounting expertise may be limited, but outsourcing partners can provide access to specialist knowledge in various accounting fields through their professional teams.

The specific processes or functions are outsourced and identified based on desired outcomes and benefits. Heese et al. (2020) asserted that the firm's goal for outsourcing should be more than just making the third party do the job while the firm relaxes. The objective must be to derive a clear benefit from the outsourcing venture, one that exceeds the desire to avoid internal effort. Outsourcing can be a strategic decision for firms, offering several advantages beyond simply delegating work (Ge et al., 2021). The goal of outsourcing should also inspire a plan of action that serves as a roadmap for business growth. Defining business goals, therefore, leads to better management of business process initiatives.

Smart Goals. The firm's goals regarding outsourcing must also be SMART. M. E. Mondejar et al. (2021) noted that intelligent methods of defining business goals enhance the practicality of starting and completing a project. Businesses have developed various methods to define business goals. One such method is choosing quantifiable goals. Yoshino et al. (2021) stated that a good business goal should allow for measurement. When firms define their goals, they identify tangible objectives, making the success and progress of those goals measurable against expected outcomes. Firms are better positioned to assess success by considering key performance questions that enable them to evaluate whether the goals have been achieved. Fischer et al. (2020) supported this view, stating that quantifiable goals allow firm management to establish specific timelines for implementing various business processes with clearly indicated objectives.

Business leaders can also define business goals by choosing specific objectives. Ilham et al. (2022) found that goals that lead to business success must move beyond

generalities. General goals may be helpful but should allow firms to derive specific and exact targets from them. Specific goals guide businesses along the correct path so that their overall missions and visions are achieved (Charles & Ochieng, 2023). The specific goals that businesses set will enable BPO planners to understand the precise guidelines they need to follow to complete projects within required timelines.

Even with outsourcing, firms need to establish achievable goals. Hickel (2019) affirmed that firms' resources and all other capabilities must be considered in order to succeed. The success of set goals in outsourcing must also be weighed against unavoidable risks and environmental factors that could impact business operations. In addition to setting specific goals, firms must also define a timeline for achieving those goals. Happonen and Siljander (2020) established that firms must work hand in hand with BPO partners to determine the project start and end dates. This helps avoid delays associated with acting on undefined or vague goals. Setting deadlines also prevents procrastination and reinforces the discipline needed to meet established targets.

Various organizations have implemented SMART methods to create effective business goals across nearly all departments. These goals must also be set and defined with clarity (Langley et al., 2023). Firms must know the exact results they want to accomplish before outsourcing. These goals must add value to the firm, even if doing so entails risk. Clarity also includes having legal goals. Every outsourcing objective must remain within the boundaries of applicable laws that govern the business or industry (Ge et al., 2021). The legal aspect of business goals means that they must comply with environmental regulations, such as promoting sustainability. Clarity further implies that

the business goal should be aligned with the company's overall strategic direction. There must be a connection between the functions being outsourced and the firm's broader vision. These outsourcing goals must support the organization's long-term aspirations.

Growth-Oriented Goals. Another way of measuring businesses regarding outsourcing is ensuring that their goals enable growth. Charles and Ochieng (2023) conducted a systematic literature review and concluded that the goals of outsourced business processes must be future-oriented. The objectives, for example, include being aware of technological changes in the business world (Williams, 1998). To enable business growth, outsourcing goals must allow organizations to address significant challenges and guide them toward new possibilities that would otherwise be unattainable.

Defining the Key Performance Indicators

Defining key performance indicators leads to better management of business process initiatives. Govindan et al. (2021) identified key performance indicators as the benchmarks stakeholders hope to achieve when they engage in outsourcing. Without defined KPIs, it would be difficult to determine whether outsourcing is worth the associated costs. After firms determine the need to outsource a particular process, management must be specific about how to attain established goals. These goals depend on the processes being outsourced. Thai et al. (2021) confirmed that getting specific with outsourcing goals means that each related activity is clearly defined and that appropriate targets are established. Management must also set specific timeframes for the completion of outsourced processes to enable easy assessment of success or failure. Additionally, key indicators of success or failure should be identified at the outset.

Managers will be able to measure targeted success against actual outcomes over time. Prajapati et al. (2020) investigated the relationship between companies' outsourcing levels, integrative capabilities, and market performance, particularly in light of emerging business process-enhancing technologies. Their findings revealed that significant outsourcing in a specific function can harm an organization's integrative capabilities and competitive position. While assessing outsourcing results, Prajapati et al. found that businesses relying on new technologies must balance growing demands for efficiency with a need for greater flexibility. Van Looy (2020) indicated that managers should be able to assess business targets to promote efficiency. Prajapati et al. further emphasized that companies should tailor their outsourcing levels to meet specific goals, including maximizing both efficiency and flexibility. Zarzycka et al. (2019) asserted that KPIs should also be defined by examining the immediate improvements BPO partners deliver. The performance management team must regularly review whether outsourced processes are achieving the required or targeted improvements. Clearly defining KPIs, therefore, leads to better management of business process initiatives.

Preparing for Potential Risks

There must be room for risks when managing outsourced processes to achieve effective results. Calvão et al. (2021) noted that firms must first identify the risks associated with outsourced projects. Most business leaders are aware of the common risks within their industry. Conducting an environmental analysis of industry-specific risks related to the processes being outsourced helps businesses prepare accordingly. It is essential to understand which risks are most likely to affect the outsourced process, not

just the overall business. Data security is a significant concern for businesses.

Rostamzadeh et al. (2021) found that when processes are outsourced, some of a firm's sensitive information may be shared with third parties. Firms should begin by identifying the security issues associated with outsourced processes. Even before working with BPO partners, firms must determine the types of data required to complete the processes.

Identifying the specific data or information that BPO partners need is critical to understanding what information firms should withhold. At all costs, firms must maintain a secure and continuous flow of information with BPO partners.

When businesses outsource, they may have to share individuals' private information with unfamiliar third-party companies. A lack of adequate security measures can lead to intellectual property loss, erosion of customer trust, and legal repercussions in the event of a data breach, leak, or unauthorized access (R. S. Gupta, 2021). Yang et al. (2020) explored data security and privacy concerns through a survey. They found that businesses face serious data protection risks when outsourcing work that involves sensitive information. The Internet of Things, smart cities, the digital transformation of organizations, and the global digital economy are driving forces behind increasing volumes of data (Kanike, 2023). As a result, the global storage market is expanding rapidly. Cloud storage has become essential in the modern world due to its ability to handle and store massive quantities of data.

Data migration to the cloud has become a top priority for governments, businesses, and individuals. This surge in data storage and processing capabilities presents profit opportunities but also introduces risks, such as privacy invasion,

unauthorized data disclosure, and illegal access. Despite this, few studies have comprehensively addressed how cloud storage systems handle security and privacy (Abdulsalam & Hedabou, 2021). When sensitive information is shared with other parties without appropriate safeguards, the data may be compromised or misused. The consequences of a data breach include theft of intellectual property, loss of customer trust, regulatory penalties, and damage to brand reputation. Offshore outsourcing adds another layer of complexity, given differences in cultural norms and legal frameworks. Businesses can reduce their exposure to these risks by conducting thorough assessments of their outsourcing partners' security practices, implementing robust data protection protocols, and ensuring compliance with all relevant privacy regulations. Continuous monitoring and auditing throughout the outsourcing engagement are crucial to maintaining the security of sensitive data.

Many companies outsource using strict quality assurance and risk management procedures. Service disruptions, such as employee turnover, absenteeism, or natural disasters, are less likely to impact operations due to redundancy planning and contingency preparations (Mehta et al., 2020). These measures increase customer satisfaction and reduce non-compliance incidents, forming the basis of a dependable service delivery model. However, researchers have also examined the unique risks that business leaders face when outsourcing. For example, Klochko et al. (2019) studied BPO within construction organization management systems in Russian firms to identify the risks encountered by outsourcing leaders. While BPO remains a valuable option for many businesses, it is not without uncontrollable risks, such as natural disasters, political

instability, and legal uncertainties. Klochko et al. found that risks like tax increases can significantly reduce a company's profitability.

Mehta et al. (2020) examined risks concerning BPO, such as vendor efficiency, by surveying telecom industry employees to gather their perceptions of outsourcing risk factors. They found that the effectiveness of third-party team performance is negatively impacted by operational risks arising from mismatched technological knowledge and strategic risks such as cultural differences. Concerns about suppliers' efficiency are among the dangers associated with BPO. The possibility that outsourcing partners may not deliver as promised is a significant concern. Inadequate resources, poor communication, or weak process management may all cause vendors to fall short of optimal efficiency, potentially resulting in service delivery delays, reduced quality, and dissatisfied customers.

From the perspective of the hospitality industry, Ejechi et al. (2020) explored the links between outsourcing utilization and perceived outsourcing advantages and risks. Companies can reduce their exposure to such risks by conducting thorough evaluations of any BPO partners they consider working with. Implementing strong communication channels, defining performance indicators, and conducting regular monitoring are essential to ensure that BPO providers maintain the necessary efficiency standards throughout the engagement. Executive leaders planning to outsource services must develop strategies that address both operational and strategic risk concerns.

Businesses engaged in outsourcing should adhere to data protection regulations. Li and Liu (2021) affirmed that with respect to data protection, firms must clearly define

potential communication challenges before outsourcing begins. BPO partners should adapt to the communication systems and channels provided by the firm. The selected communication platforms must be those trusted by the firm's management and designated for specific purposes. Le Ludec et al. (2023) emphasized that having established rules concerning data use is essential for protecting information during outsourcing. Firms can set permissions and guidelines that their teams and partners must follow when sharing data. For example, setting access permissions before releasing data can enable firms to control the specific types of information shared with third parties. These permissions ensure that partners receive only the data necessary for their tasks. This approach helps minimize the risk of data loss or exposure of organizational information.

Evaluating the risks and benefits of outsourcing is essential for effective BPO management. Tseng et al. (2022) found that firms must accept that certain risks are unavoidable when considering outsourcing. Companies can, however, develop strategies to manage some risks as they arise. When problems occur, firms must address them promptly, based on their potential impact and relevance to ongoing outsourced activities. Mancini et al. (2021) asserted that risks are always present when outsourcing any part of a firm's operations. The best course of action is for firms to prepare in advance to face these risks. Early risk planning can help minimize the probability of negative outcomes. However, risks that cannot be eliminated must be assessed using the firm's best available resources. In some cases, firms may need to accept losses from these risks, particularly when the cost of the risk is outweighed by the benefits of outsourcing. In such instances,

the losses may be tolerable. Therefore, allowing room for risk leads to more effective management of business process initiatives.

Assessing Third-Party Providers

Assessing third-party BPO partners is a strategy for managing outsourcing processes. With the rapid growth of the BPO industry, the demand for outsourcing service providers has increased significantly. Wang et al. (2021) stated that identifying a BPO provider suitable for outsourcing processes requires substantial effort. Firms must proceed carefully to ensure that only the right BPO providers are selected. Choosing the right provider demands deliberate effort from firms to achieve the desired outcomes from the outsourcing process (Liu et al., 2023). It is necessary for firms to assess their partners' levels of expertise and experience in the specific services they require.

Exercise Due Diligence. Liu et al. (2023) revealed that specific criteria are essential for identifying the right BPO provider. First, the provider must possess knowledge of the industry and an understanding of the relevant processes. This expertise allows BPO providers to complete assignments within required timelines. Additionally, the right provider must have a proven track record of success. Having a partner who has previously succeeded with the firm instills confidence in the outsourcing process. Ali et al. (2022) indicated that a history of successful projects with the firm suggests that the partner can be trusted with future engagements. Partners familiar with a firm's operations enables more accurate cost assessments. Another important consideration is the dedication and commitment of the provider. A provider's willingness to fully serve the

firm increases the likelihood of successful project outcomes. Firms must confirm that they will receive the value they expect from their outsourcing partners.

Another criterion for assessing outsourcing partners is goal alignment. Firms must ensure that their BPO partners' goals are aligned with their own strategic objectives (Charles & Ochieng, 2023). Partners need to understand the firm's overarching goals to avoid undermining strategic success. Often, firms evaluate the history of prior contracts with third-party providers to assess their reliability and risk profile. Providers who have demonstrated consistent alignment with a firm's goals are best suited for future outsourcing engagements. Masucci et al. (2020) asserted that the best partners are those who can integrate with other internal processes within the firm. Providers with even a general understanding of departmental functions are well-positioned to meet the firm's needs. Therefore, assessing third-party BPO partners is a critical strategy for managing outsourcing processes.

Implementing Change Management Strategies

Implementing change management strategies helps firms manage business outsourcing effectively. Outsourcing often introduces changes to existing workflows, systems, and structures. Charles and Ochieng (2023) found that outsourcing specific functions may disrupt established operations. Bellantuono et al. (2021) affirmed that effective change management strategies allow firms to adapt to such disruptions, preventing future issues. A well-structured plan is necessary before outsourcing begins. Change may also affect employees, requiring firms to implement strategies that help staff adjust smoothly.

Occupational stress can arise from the complexity of job responsibilities and high expectations regarding third-party vendors' skill sets. Workload challenges and tight deadlines are common in companies offering BPO services (Pradoto et al., 2022). These pressures may elevate stress levels and hinder vendor performance, reducing the likelihood of successful outcomes. To minimize these challenges, Dhal et al. (2022) recommended that executive leaders foster a supportive environment for vendors to deliver high-quality services. In a project on occupational stress in a Sri Lankan BPO company, Dhal et al. highlighted that one of the key drawbacks of outsourcing is the stress imposed on workers.

Workplace stress related to outsourcing can be mitigated through effective stress management techniques. One way to reduce fear and confusion among employees is by promoting open communication and transparency. Providing staff with the tools to adapt positively to new roles and technologies can boost morale and reduce the strain of transitions. Employees cope better with change when they have established support networks, are checked on regularly, and have access to mental health resources.

Encouraging a more flexible work environment and recognizing employees for their accomplishments can help reduce stress levels and improve overall productivity. When jobs are outsourced, it can be stressful for workers, who may worry about being laid off or having their responsibilities changed (Pradoto et al., 2022). Misunderstandings may arise due to a lack of communication between in-house teams and outsourced suppliers, which can affect work quality. Leaders can ease the transition and reduce stress by maintaining open lines of communication (Kim & Jung, 2022). Stress levels may also

rise due to adjusting to unfamiliar procedures and collaborating with distributed teams. Maintaining employee satisfaction and productivity during outsourcing requires proactive attention to these issues.

Implementing a Change Management Plan. Cragg and Chraibi (2020)

identified that without implementing an effective change management plan, outsourcing can lead to challenges, such as resistance to change, loss of service continuity, and communication breakdowns. These risks highlight the importance of deploying effective change management strategies. Organizations can minimize disruption by planning to ensure smooth transitions for employees. Kaur Bagga et al. (2022) emphasized that effective change management strategies equip BPO providers with the information, training, and support necessary to perform their roles successfully. By providing BPO providers with the right tools, support, and resources, organizations can ensure that vendors deliver desired outcomes and contribute to business success. Therefore, firms should invest time and effort in implementing change strategies that mitigate disruptions for both BPO providers and internal employees. Implementing change management strategies, thus, supports effective outsourcing. During outsourcing, change is inevitable. Organizational change management is the process through which organizations leverage opportunities and ideas to streamline operations or resolve challenges.

Maintaining a competitive edge in today's fast-paced business environment is essential for companies seeking to remain successful. Shafiee and Emadi (2020) found that BPO has helped companies retain their competitive edge in both regional and global markets in recent years, as outsourcing has shifted from a management trend to a core

strategic concern. Due to the complexity and unpredictability of project timelines, companies outsource certain operations to ensure business continuity and success (Charles & Ochieng, 2023). To achieve this, strong outsourced management structures are necessary. Avoiding issues in the outsourcing process requires strategic decision-making and selecting the right organizational approaches. Understanding the criteria and key factors for selecting appropriate providers and strategies is essential for effective BPO. Business leaders need clarity about their firm's position and the factors influencing outsourcing in order to make sound strategic choices. Given the complexity of today's decision-making environment, it is increasingly important for managers to use efficient quantitative methods when evaluating outsourcing options and selecting suppliers.

Communication of the Changes. Communication effectiveness is a major challenge for organizations during times of change. Akbar et al. (2019) determined that employees and stakeholders want clear explanations for changes that affect their roles. Outsourcing itself is a form of change (Happonen & Siljander, 2020). Internal teams may be skeptical or cautious when new external partners are introduced to collaborate on critical functions. These teams will need assurance that they are expected to support the changes and understand their implications. The most effective way to overcome resistance is to clearly communicate the reasons behind the changes.

Communication between BPO partners and the firm also influences change outcomes. Happonen and Siljander (2020) emphasized that communication must involve all key players affected by the outsourcing process. These individuals influence operations and internal teams in various ways. Employees must be introduced to the

external players they will work with so they can prepare for collaboration. Management must clearly inform stakeholders about the start and end dates of outsourcing phases. Arenas et al. (2020) also noted that stakeholders are more likely to embrace changes when timeframes are communicated clearly, allowing them to prepare for new workflows and responsibilities. Additionally, internal teams should be informed about how the changes will impact their work so they can adapt effectively.

Formulating a Plan for Change. Another effective change management practice is having a clear plan for implementing changes. Schipper (2020) identified that for managers to ensure effectiveness throughout the change management process, they must enable every stakeholder in the firm to clearly understand the roadmap for change. Swaidi (2022) argued that a robust plan ensures each area, individual, or department knows its exact role in facilitating the change. A clear roadmap also implies that there are specific targets associated with the changes, enabling BPO partners to understand their objectives. Having a well-defined plan is a sound change management practice.

Identifying and Addressing Change Resistance. Top managers who oversee outsourcing arrangements must be prepared for resistance. Vasan et al. (2019) noted that it is common for people to initially resist change, particularly when they struggle to understand the benefits or feel excluded from the change process. Despite efforts to communicate changes clearly, some employees may remain reluctant, especially if they believe the changes will negatively affect their roles. Chatterjee (2023) found that, for every BPO initiative, firms must first identify team members who resist or oppose the changes. Firms should implement systematic feedback mechanisms to address resistance-

related issues. These systems help anticipate pushback and identify the best ways to respond to employee concerns. Preparing for resistance is one of the most effective strategies for managing organizational change.

Managing and Improving Provider Relations

How firms treat visiting BPO providers directly affects the outcomes of the outsourcing engagement. Blackwood (2023) noted that in organizations where BPO providers feel welcomed and included, it is easier for them to integrate and collaborate with employees than in organizations that treat them as outsiders. Strengthening relationships with BPO providers benefits firms, as both parties work toward shared goals (Charles & Ochieng, 2023). When firms take their relationships with providers seriously, vendors are more likely to reciprocate with the same level of commitment. When both parties treat the partnership with mutual respect, the benefits are maximized (H. C. U. Mondejar & Asio, 2023).

A good starting point is treating BPO partners as integral members of the firm's teams. Doing so fosters shared motivation and collaboration. H. C. U. Mondejar and Asio (2023) reported that BPO partners may also be involved in firm-level decision-making processes. When firms foster interaction between employees and outsourcing partners, they create bonds that strengthen professional relationships, resulting in smoother cooperation and improved performance. The stronger the relationship with BPO partners, the greater the firm's competitive advantage. This competitive edge can enhance profitability relative to other firms in the industry.

Setting Clear Goals and Expectations. Clearly defined goals and expectations improve the overall outcomes of BPO. Larsen et al. (2023) emphasized that establishing clear expectations at the beginning of the BPO relationship enhances collaboration and performance. When BPO providers understand what is expected from the outset, it becomes easier for them to meet performance standards. Communicating goals through structured channels fosters alignment. Hickel (2019) noted that clearly defined goals help BPO providers understand their boundaries, reducing the likelihood of misunderstandings or conflicts between firms and outsourcing vendors.

It is also essential to provide employees with timely and consistent feedback so that they understand performance expectations and how their efforts are being rewarded. Feedback helps address performance gaps and supports employee growth. Managers and supervisors should encourage collaboration, offer support, and create a positive, team-oriented workplace culture. These practices help employees reach their full potential. Setting clear goals and expectations ultimately enhances the success of BPO relationships.

Clarity of Workflow. Clarity of workflow fosters the relationship between firms and BPO providers by supporting the development of transitional and onboarding procedures between both parties. Altman et al. (2020) posited that when workflow clarity exists between internal teams and BPO providers, the providers are better able to understand their responsibilities. This enables them to manage the tasks they receive more effectively and align with the firm's overarching goals. Kompella (2021) revealed that understanding transitional and onboarding workflows allows BPO teams to shift

away from practices used in previous firms and fully concentrate on their current client's objectives. With this understanding, BPO providers can adapt to the specific needs of their new clients, aligning themselves with the firm's goals. How firms treat their BPO providers also significantly influences the quality of the outcomes. Therefore, clarity of workflow contributes to more effective change management.

Getting Involved. Firms must remain actively engaged to ensure optimal management of BPO relationships. Zarzycka et al. (2019) emphasized that executive teams should be involved in every key decision during the outsourcing process. Such involvement signals to BPO partners that the firm's leadership is supportive and engaged. This engagement may take the form of transparent discussions about the areas that are most critical to the success of the outsourced work. Asada et al. (2020) noted that executives who are open to ideas and suggestions from their BPO partners tend to foster stronger relationships. Through open communication, expectations and concerns can be shared on both sides. This transparency helps reduce conflict and encourages smoother collaboration. Executive involvement in BPO relationships supports improved change management and long-term success.

Defining the Partnership. Some firms may assume that both parties intuitively understand their roles in the outsourcing relationship. However, Happonen and Siljander (2020) established that it is vital to define every aspect of the outsourced relationship at the negotiation stage. There must be clarity on the financial arrangements and the specific benefits each party expects from the partnership. Raymaker et al. (2020) noted that clearly defining the partnership ensures mutual understanding of expectations. This

clarity helps strengthen the bond between both parties, making future collaborations easier. Firms must also explicitly define the type of contract and business arrangement they are entering into with their BPO providers.

Summary

The aim of this qualitative single case study was to identify and explore strategies that some executive leaders use to manage third-party service providers and lead successful BPO initiatives. The project was grounded in two theoretical frameworks: DCT and SDT. These theories guided the investigation by framing how organizations can develop adaptive strategies and support intrinsic motivation among employees in outsourcing contexts. The literature review revealed a range of strategic approaches that have been employed to manage BPO relationships effectively.

Key strategies identified in the review included the optimization of knowledge management processes, which facilitate better coordination between firms and BPO providers. Additionally, defining the goals of the business and establishing clear key performance indicators (KPIs) were found to be essential in aligning outsourcing outcomes with organizational objectives. Preparing for potential risks, particularly in relation to data security and vendor reliability, was also emphasized as a critical element of successful BPO management. The literature further highlighted the importance of thoroughly assessing third-party providers based on expertise, track record, and strategic fit.

Another major area of focus was the implementation of effective change management strategies to help firms navigate the disruptions that often accompany

outsourcing transitions. This includes supporting employees through clear communication, structured planning, and ongoing feedback mechanisms. Finally, the review addressed the need to manage and improve provider relations through open dialogue, shared goal-setting, and mutual accountability. Taken together, these findings offer valuable insights for executive leaders seeking to enhance the effectiveness of their BPO initiatives. The next section of the project presents the research design, data collection procedures, and data analysis methods used to explore these strategies in practice.

Transition

This section presented the foundational elements of the project, including the background of the problem and its purpose, which focuses on exploring the strategies that executive leaders have employed to successfully implement BPO initiatives. It also outlined the nature of the project, the central research question, and the interview questions designed to guide data collection. In addition, this section provided an overview of the theoretical framework, defined key operational terms, and reviewed relevant academic and professional literature. In Section 2, I detail the research methodology, including the design and rationale, participant selection and sampling, ethical procedures, data-collection instruments and techniques, data analysis, and strategies for reliability and validity. In Section 3, I present the findings, organized by themes, and integrate them with the theoretical framework and literature. This is followed by applications to professional practice, implications for social change, recommendations for action and further research, reflections, and a conclusion.

Section 2: The Project

In Section 2, the systematic procedures that guided this qualitative single-case study from data generation through interpretation are described. The purpose of this qualitative single-case study was to explore effective strategies some executive leaders used to lead successful BPO initiatives. Grounded in dynamic capabilities theory and self-determination theory, the central research question was, “What strategies do executive leaders use to lead successful BPO initiatives?” A qualitative case design was appropriate because it enabled an in-depth examination of contemporary, real-life decisions within their organizational context and has proven robust for business leadership inquiries in complex service environments, as noted by Sibbald et al. (2021).

In this section, I clarify my role as the researcher, document the reflexivity practices I employed, and outline the ethical obligations that governed data collection and analysis. Maintaining reflexive awareness throughout data collection protects analytic integrity (Peddle, 2021). In the participants section, the target population is described, and the purposive sampling logic used to recruit information-rich cases is justified, an approach widely endorsed for qualitative work (Andrade, 2021). In the research method and design section, I elaborate on why a qualitative approach and a single-case structure best align with the project’s exploratory aims. This is followed by the population and sampling details section, where the recruitment pathways and saturation benchmarks are addressed. Ethical safeguards are outlined in the ethical research subsection, which includes informed-consent procedures, IRB review, and secure data management, in accordance with the Belmont principles and Walden policy.

Data handling follows, after which data collection instruments are discussed. The data collection technique is a stepwise narrative of recruitment, interviewing, and artifact gathering. In the data organization technique section, I explain the encrypted storage schema, version control, and audit trail practices used to ensure data security and accessibility for dependability checks. Data analysis is then addressed. Reliability and validity are discussed next. The final section is a transition to Section 3.

Purpose Statement

The purpose of this qualitative single case study was to explore effective strategies that some executive leaders use to lead successful BPO initiatives.

Role of the Researcher

As is common in qualitative research, I served as the primary instrument for data collection and analysis. This role required me to remain mindful of how my own perspectives and prior experiences could shape interactions with participants or influence the interpretation of the data. To reduce these risks, I engaged in deliberate reflexivity and maintained awareness of potential bias throughout the study. I conducted, recorded, and later transcribed 10 semistructured Zoom interviews with executive leaders. I had no personal or professional relationships with the participants or the focal organization, which minimized concerns related to power dynamics. Prior to beginning data collection, I obtained approval from the Walden University Institutional Review Board and followed the Belmont Report's principles of respect for persons, beneficence, and justice (Nagai et al., 2022). The Walden IRB approval number for this study is 02-21-25-027534. Each participant received an informed consent form that explained the study's purpose,

potential risks and benefits, and the voluntary nature of participation. All signed consents were obtained electronically and stored in an encrypted archive. Because interviews were the primary data source in this qualitative case study, I developed and used a semistructured interview protocol to standardize question sequencing and prompts across participants, align the questions with the research question and theoretical framework, and support consistency while allowing probing to achieve depth. The protocol also served as a bias-mitigation and audit-trail tool by reducing ad hoc questioning and documenting procedures. The complete interview protocol is provided in Appendix A.

Throughout the project, I cultivated reflexivity through a structured journal in which I logged assumptions, emotional reactions, and methodological decisions after every interview. This practice aligned with current guidance that positioned reflexivity as a continuous, multifaceted activity for ensuring research quality (Peddle, 2021). To further bracket preconceptions, I reviewed my journal before coding sessions and deliberately compared emerging codes with raw data, a strategy recommended by Tufford and Newman (2012) to expose and mitigate bias. These procedures complemented the impartial stance advocated by K. R. Yin (2018), who emphasized the researcher's obligation to present evidence fairly.

I protected confidentiality by replacing names with identifiers, such as Participant 1, at the first point of contact and redacting all organizational references from transcripts. Data were stored on an AES-256–encrypted solid-state drive accessible only to me. All files will be deleted 5 years after the project's publication, consistent with Walden University policy. To thank participants for their time without exerting undue influence, I

emailed a \$10 digital gift card after each member-checking session, a modest incentive designed to acknowledge contribution while avoiding coercion.

Because I possessed prior professional experience in project management, I remained alert to insider interpretive bias. I triangulated interview data with archival governance dashboards and postimplementation reports to corroborate participants' claims, a practice Stenfors et al. (2020) identified as essential when the researcher is closely engaged with the topic. Member checking allowed participants to verify the accuracy of transcripts and preliminary interpretations. These steps helped enhance credibility, dependability, confirmability, and transferability of findings.

Population

The population for this project consisted of executive-level business leaders who had successfully managed BPO initiatives in the southeastern United States, specifically in Alabama, Georgia, Florida, North Carolina, South Carolina, and Tennessee. Purposive sampling was employed because it enabled the deliberate recruitment of information-rich cases, specifically leaders whose experience aligned directly with the project's purpose, thereby maximizing analytic depth in accordance with the assertions by Campbell et al. (2020). Eligibility criteria required that each participant (a) held a C-suite title (chief executive officer, chief financial officer, or chief operating officer), (b) possessed a minimum of 5 years' executive experience, and (c) had overseen at least one BPO project between 2021 and 2023. Verification of criteria occurred through professional network biographies, LinkedIn profiles, and corporate press releases that documented BPO project oversight. Documentation was cross-checked before invitations were issued.

The project involved 10 senior executive leaders, including chief operations officers, vice presidents, or director-level managers employed by mid- to large-sized United States organizations who had overseen at least one business-process-outsourcing initiative within the past 24 months. After Institutional Review Board approval (02-21-25-027534), potential participants were identified through professional associations and corporate websites and then contacted via personalized emails that included an electronic informed consent form. Because BPO executives often maintain demanding schedules, snowball sampling was used to supplement initial outreach. Enrolled executives were invited to forward the project information to qualified peers, a strategy that expanded access to hard-to-reach leaders while preserving purposive intent (Naderifar et al., 2022). Recruitment continued until data saturation, the juncture at which no new codes or themes emerged, was observed after the eighth interview. Two additional interviews were conducted to confirm saturation, yielding a final sample of 10 executives. Contemporary guidance suggests that saturation in homogeneous interview studies typically occurs within nine sample cases, as noted by Hennink and Kaiser (2022), supporting the adequacy of the sample size of 10.

Each executive received a project packet explaining the purpose, risks, benefits, and the voluntary nature of participation. Consent was returned electronically. Pseudonyms were assigned immediately to protect confidentiality. Interviews were scheduled at the participants' convenience and conducted on Zoom. The purposive–snowball combination ensured that information-rich executives were recruited efficiently. Adherence to saturation criteria safeguarded analytic completeness.

Research Method and Design

A research method refers to the specific techniques and strategies used to collect, organize, and analyze data within a project (Bhangu et al., 2023). In contrast, a research design provides the overall structure and procedural framework that guides the collection, analysis, interpretation, and reporting of data (Renjith et al., 2021). The alignment between the research question, design, and method ensures the project's internal coherence and rigor (Bhangu et al., 2023). In this section, the selected research method and design are presented. Justification is provided to demonstrate how these choices effectively support the project's purpose and objectives.

Research Method

This project employed a qualitative approach because it yielded rich, context-bound explanations of managerial decision-making that could not have been reduced to numerical variables. Qualitative inquiry is especially appropriate for exploring complex, situated phenomena, such as executive leadership during business-process outsourcing (BPO) initiatives, because it privileges participants' meaning-making and the interplay of social context (Lim, 2024; Strijker et al., 2020).

Quantitative designs were rejected because they would have restricted the investigation to prespecified variables and ignored how leaders interpreted evolving outsourcing conditions (Taherdoost, 2022). A mixed-methods alternative was likewise deemed unnecessary. Although the integration of numeric and textual data can deepen understanding, it also introduces unwarranted procedural complexity when the research purpose is explanatory rather than predictive (Adu et al., 2022). By contrast, the

qualitative tradition allowed multiple evidence sources, including semistructured interviews and organizational artifacts, to converge, thereby producing detailed, actionable findings.

Philosophically, the project rested on constructivist assumptions in which knowledge was co-created between the participant and me, and multiple realities were considered valid (McElravy, 2022). These axioms aligned with Lincoln and Guba's (1985) naturalistic paradigm and have long guided qualitative business research that seeks context-dependent insights rather than general laws.

Research Design

A single-case study design, as articulated by K. R. Yin (2018), guided data collection and analysis. Case study methodology excels at answering *how* and *why* questions, permitting an in-depth examination of a contemporary phenomenon within its real-life setting (Paparini et al., 2020). The bounded case in this investigation was one United States firm that had recently completed several high-visibility BPO projects, creating an exemplar context for projecting leadership strategies *in situ* (Sibbald et al., 2021).

Alternative qualitative designs were considered but ruled out. Phenomenology would have shifted attention from organizational strategy to the universal essence of individual lived experience, thereby abstracting the inquiry from the business context, as exemplified by Alhazmi and Kaufmann (2022). Grounded theory requires iterative sampling aimed at theory generation (Charmaz & Thornberg, 2020). In the current project, the investigator sought to explicate existing leadership routines, not to build a

midrange theory from scratch. Ethnography demands prolonged cultural immersion (Black et al., 2021). By contrast, the analytical focus in the current project entailed discrete strategic episodes rather than an entire culture, making ethnography unsuitable.

The single-case boundary was defined by organization, time frame (BPO projects completed in 2021–2023), and participant role (executives with direct oversight). This delimitation enhanced analytic depth while still permitting theoretical generalization to similar outsourcing contexts. Data sources, including Zoom interviews, postimplementation reports, and governance dashboards, were triangulated to strengthen construct validity, a practice widely recommended in contemporary case-project scholarship (Sibbald et al., 2021; Strijker et al., 2020).

The design's epistemological stance entailed assuming that reality is socially constructed. Thus, findings emerged from iterative interpretation rather than statistical inference. Employing a reflexive thematic logic allowed me to capture divergent viewpoints while still generating coherent themes. By integrating multiple evidence streams within a bounded system, the case study produced transferable insights for practitioners managing comparable BPO initiatives.

Population and Sampling

The target population for this project comprised senior executive leaders (chief operations officers, vice presidents, and director-level managers) working in mid- to large-sized United States firms that had overseen at least one BPO initiative between 2021 and 2023. Because the case organization contained a finite number of such leaders, the accessible population totaled 14 individuals, all located at the firm's headquarters. A

purposive sampling strategy was implemented. Executives were deliberately selected because they possessed firsthand, information-rich knowledge of BPO governance, a criterion central to purposive logic (Ahmad & Wilkins, 2025). Each prospective participant met three inclusion criteria: (a) held an executive title during the outsourcing project, (b) exercised direct decision-making authority over third-party vendors, and (c) completed the project within the prior 24 months. No exclusion criteria beyond lack of project involvement were applied, ensuring that every eligible voice from the bounded case could be considered.

Ten executives ultimately participated. Data collection ceased after the 10th interview, at which point consecutive transcripts produced no novel codes or subthemes, a classic indicator of thematic saturation in qualitative studies (M. Hennink & Kaiser, 2022). The final size also aligned with contemporary business-case guidance suggesting that 9–17 interviews are sufficient to reach saturation when the participant group is relatively homogeneous (Bouncken et al., 2025).

Following Institutional Review Board approval, I requested the organization's chief human resources officer to send an email invitation containing the project overview, consent form, and researcher contact details. Executives who wished to participate replied directly and scheduled a 1-hour Zoom meeting at their convenience. Two reminder emails, spaced 1 week apart, were dispatched to non-responders. No additional follow-ups occurred.

Purposive sampling was preferred over probability techniques because I sought depth of experiential insight rather than statistical generalization (Robinson, 2024).

Limiting the frame to a single organization strengthened contextual coherence, a key objective in single-case design, as noted by Strijker et al. (2020), while still producing a sufficiently diverse pool of perspectives across hierarchical roles. The achieved sample balanced methodological rigor with practical feasibility.

Ethical Research

I followed specific procedures to safeguard participants from harm from initial contact through data collection, analysis, and reporting of findings. Before beginning any communications with prospective participants, I obtained full approval from the Walden University Institutional Review Board (IRB) to ensure that all ethical protections were adequate. The Walden IRB approval number for this study was 02-21-25-027534. The IRB application documented the study's minimal risk profile, detailed the data protection plan, and outlined the participant compensation procedure. In addition, a formal site permission letter from the focal organization authorized access to archival project artifacts and confirmed that all corporate documents could be cited in deidentified form.

Informed consent was obtained remotely through a secure tele-consent process conducted immediately before each Zoom interview. I screen-shared the consent form, reviewed all elements, answered questions, and recorded verbal and electronic consent. Recent work demonstrates that well-structured tele-consent procedures preserve participant comprehension while expanding access for geographically dispersed samples, meeting the Belmont principles of respect for persons and justice (K. M. Serpico, 2024). Participants were reminded that they could decline to answer any question or withdraw at any time without penalty.

To recognize participants' contributions without exerting undue influence, each executive received a \$10 digital gift card after completing member checking. Current ethics guidance underscores that modest, flexible incentives honor participants' time when delivered transparently and with cultural humility (D. M. Duenas et al., 2024). No additional remuneration was offered, and acceptance of the incentive did not obligate ongoing participation.

Confidentiality was maintained by substituting pseudonyms for all personal identifiers at first contact. Organizational names and proprietary project codes were redacted from transcripts and artifacts. Contextual descriptors rather than direct labels preserved analytic meaning while shielding identities. Raw audio files, transcripts, consent forms, and corporate documents were stored on an AES-256–encrypted solid-state drive accessible only to the research team. Consistent with data-lifecycle privacy recommendations, the drive will be destroyed 5 years after publication, minimizing long-term reidentification risk as noted by D. Lamb et al. (2024). Deidentified excerpts were archived separately to enable secondary analysis under a data-use agreement.

Because I had no employment or financial ties to the participating firm or to any vendor involved in its outsourcing projects, no conflicts of interest were present. A reflexive journal documented ethical decisions, including the handling of any unanticipated disclosures that might have posed reputational risk to the organization. Should a future request for raw data arise, I would require evidence of IRB clearance from the requesting party and would release only those materials stripped of direct identifiers, in line with the Five Safes framework for secure data access as noted by H.

Jang et al. (2023). By integrating IRB oversight, tele-consent, culturally sensitive incentives, robust data protection protocols, and a transparent audit trail, I complied with federal regulations and upheld contemporary ethical standards for qualitative research with elite executive participants.

Data-Collection Instruments

I employed two complementary data-collection instruments, including a researcher-produced, semistructured interview protocol administered via Zoom and a curated set of organizational artifacts (postimplementation reports and governance dashboards). These instruments generated rich, triangulated evidence capable of answering the central research question about leadership strategies for successful business-process outsourcing (BPO) initiatives. The interview protocol was designed after a focused review of recent outsourcing and leadership scholarship and refined through expert consultation with two senior qualitative methodologists, thereby establishing content validity. The guide comprised seven open-ended core questions with optional probes that explored participants' strategic approaches, risk-mitigation practices, success metrics, and lessons learned, all mapped directly to the theoretical constructs of dynamic capabilities and self-determination.

Conducting interviews on Zoom preserved rapport while accommodating participants' geographically dispersed schedules. Current methodological literature affirms that videoconferencing platforms can capture interactional details comparable to in-person sessions when researchers follow structured protocols (De Villiers et al., 2022).

Each interview was audio-recorded using Zoom's audio recorder, producing high-quality MP4 files that were transcribed verbatim in NVivo-compatible format.

Archival documents supplied a second source of evidence. The focal organization's digital repository yielded seven postimplementation reports endorsed by the chief information officer and three quarterly governance dashboards bearing electronic signatures, attesting to their authenticity and reputability as corporate records. These artifacts detailed vendor performance against contractual service-level agreements and captured board-level reflections on project outcomes, providing objective corroboration of interview claims and extending the temporal scope of the evidence base. Since the reports were contemporaneous with the BPO projects under study and generated through the firm's ISO-certified quality management system, they represented the best available documentary source for triangulation.

The sufficiency of the instruments was demonstrated through iterative review during data collection. After the eighth interview, no new substantive codes were emerging, a signal of saturation, yet two additional interviews were completed to confirm thematic stability. Member checking followed transcription. Each executive reviewed their transcript and the preliminary codebook within 3 days, confirming factual accuracy and interpretive resonance, a practice shown to enhance confirmability and co-constructed understanding in qualitative case studies (de Loyola González-Salgado et al., 2024).

The instruments were tailored to the project's context. The interview guide employed terminology familiar to BPO executives (e.g., service-level agreement, vendor

governance) and avoided jargon that might alienate participants from diverse industry backgrounds, thus enhancing cultural and contextual appropriateness. Since the guide was researcher-developed rather than published, issues of prior use did not arise. Instead, its validity rested on expert review, alignment with contemporary literature, and pilot testing with two nonparticipant executives whose feedback prompted minor syntactic adjustments but no substantive revisions.

Data-Collection Technique

Immediately after IRB approval, the chief human resources officer emailed an invitation packet to all 14 eligible executives. The packet contained the project overview, consent form, and a Calendly link that displayed my available 60-minute Zoom slots over a 4-week window. Ten executives scheduled interviews within the first 2 weeks. Two declined because of travel, and two did not respond after a second reminder. Relying on an in-house liaison to distribute the invitation minimized perceived coercion and aligned with recommended gatekeeper protocols for elite samples (Kaiser & Hennink, 2020).

Interviews were conducted via Zoom between May and July 2025, each lasting 45–60 minutes ($M = 56$). I began by reviewing the consent form on screen and confirming permission to record. A semistructured guide of seven open-ended questions, developed from the research purpose and piloted with an external executive, allowed conversational depth while ensuring comparable coverage across participants (Brinkmann, 2022). I used reflective probes to elicit concrete examples. Screen-sharing enabled participants to reference proprietary dashboards or vendor scorecards while

speaking. Audio-visual files were saved directly to an encrypted solid-state drive immediately after each session.

Following each interview, participants emailed supporting documents, such as BPO charters, postimplementation reviews, and vendor-performance dashboards. These artifacts were cataloged in NVivo 14, tagged by project phase, and linked to the corresponding interview case node. Incorporating multiple evidence sources enhanced data triangulation and construct validity.

Within 48 hours of each interview, I produced a verbatim transcript, summarized preliminary interpretations in a one-page analytic memo, and emailed both files to the participant for verification. Eight executives confirmed accuracy without change. Two executives suggested minor wording clarifications, which were incorporated. This iterative member-checking cycle bolstered credibility and helped guard against researcher misinterpretation. Field notes documenting nonverbal cues, contextual observations, and reflexive insights were appended to each case record.

Data collection ceased after the 10th interview when two consecutive transcripts yielded no new first-order codes, a saturation benchmark supported by recent empirical tests in homogeneous executive samples (Hennink & Kaiser, 2022; Nelson, 2020). The final corpus comprised 9 hours, 23 minutes of interview footage and 184 pages of supporting documents, providing a rich, triangulated dataset for thematic analysis. By sequencing invitations, Zoom interviews, artifact gathering, and member checking, the project followed contemporary qualitative guidance for remote settings while maintaining methodological rigor and ethical compliance.

Data-Organization Technique

Immediately after each interview, the audiovisual file was exported from Zoom and renamed with a unique, anonymous identifier using the pattern EN##_YYYYMMDD. Verbatim Microsoft Word transcripts received the suffix _TR, whereas the corresponding analytic memo received _AM. Every document version was time-stamped and archived in a private GitLab repository that tracked changes automatically, a practice recommended for maintaining an auditable trail in qualitative projects (Jackson & Bazeley, 2023).

Primary data resided on an AES-256–encrypted solid-state drive (SSD). At the end of each work session, the SSD was mirrored to two destinations: (a) a BitLocker-encrypted SharePoint folder accessible only to the research team and (b) an offline, fire-safe hard drive stored separately. Redundant encryption and geo-separate backups mitigate catastrophic loss while satisfying organizational data-protection policies (Richards & Hemphill, 2022).

A single NVivo 14 project file housed all transcripts, artifacts, and field notes. Case classifications tagged each executive’s role and project phase (initiation, transition, steady state). Memos, reflexive journal entries, and decision logs were linked to analytic nodes in real time, creating a robust internal audit trail. Weekly exports of the evolving codebook to .csv ensured that the coding scheme could be inspected independently of proprietary software.

Consistent with Walden policy, raw data will remain on the encrypted SSD for 5 years post publication and will then be destroyed via triple-pass overwrite. Deidentified

excerpts and the final codebook will be retained indefinitely to facilitate scholarly replication, provided that any secondary user secures independent IRB approval. Every procedural decision (such as, code merges, theme declarations, or revisions prompted by member checking) was logged in a standing “Decisions Register” spreadsheet. This register, combined with GitLab commit histories and NVivo memo links, produces a transparent chain of evidence that strengthened dependability and confirmability.

Data Analysis

All analytic procedures were completed within NVivo 14, following a reflexive thematic analysis (RTA) framework grounded in the six-phase model articulated by Braun and Clarke (2022). The process was inductive at the coding level, allowing patterns to emerge from interview narratives and organizational artifacts, yet deductively informed by the project’s dynamic capabilities and self-determination theoretical lenses when themes were refined. Data familiarization began as soon as each MP4 audio file was transcribed. I listened to the recordings while reading the verbatim transcripts, noting first impressions in analytic memos that were linked to transcript locations. This reflexive annotation created an audit trail of evolving insights and aligned with Braun and Clarke’s (2022) emphasis on continual researcher self-awareness in qualitative analysis.

Phase 2 entailed generating initial codes. Using NVivo’s coding feature, the investigator tagged verbatim phrases that captured strategic actions, decision routines, and motivational cues. Codes were created iteratively. When ambiguity arose, I consulted my reflexive journal to bracket preunderstandings and returned to the raw data until meaning was clarified. A running codebook documented each code definition, a decision

trail, and frequency counts, promoting dependability and enabling peer scrutiny (Naeem et al., 2023).

In Phase 3, I searched for candidate themes by visually mapping code clusters using NVivo's mind-mapping tool. Related codes, such as vendor governance practices, performance-metric alignment, and intrinsic motivation tactics were grouped and provisionally labeled. Organizational artifacts were coded in parallel, and cross-source queries verified whether interview-generated patterns were corroborated by postimplementation reports or governance dashboards.

In Stage 4, themes were reviewed for coherence. Each provisional theme was examined against its coded extracts and the full data set to ensure internal homogeneity and external heterogeneity, satisfying Braun and Clarke's (2022) criterion for thematic integrity. Where overlap occurred, for example, between strategic alignment and benefits-realization codes, thematic boundaries were renegotiated or, when necessary, themes were merged.

In Phase 5, themes were defined and named. I wrote analytic memos that articulated the essence of each theme, delineated its scope, and explained its relationship to the research question and theoretical framework. This step operationalized the recommendation of Clarke and Braun (2021) that researchers craft concise thematic narratives to enhance analytic transparency.

In the final step, Phase 6, I produced the final report. A matrix coding query generated illustrative quotations for each theme, and data displays were exported to Microsoft Excel to calculate relative code densities, providing a descriptive overview

without violating qualitative assumptions. The write-up weaved these quotations with interpretive commentary to demonstrate a transparent chain of evidence from raw data to conclusions.

Throughout the analysis, I maintained rigor via three trustworthiness techniques. First, weekly peer-debriefing sessions with an experienced qualitative scholar challenged coding decisions and thematic logic, a practice endorsed in recent guidelines for good RTA practice (Braun & Clarke, 2022). Second, member checking occurred after initial theme development. Participants confirmed the resonance of summaries and corrected minor factual inaccuracies, bolstering credibility. Third, an audit trail comprising decision logs, coding stripes, and memo timestamps was archived on an encrypted drive to ensure confirmability and facilitate potential secondary analysis by future scholars.

The analysis also respected the bounded nature of the single-case design by treating each executive as an embedded unit. A within-case comparison identified patterns across the 10 executives, while an across data sources comparison integrated findings from interviews and documents. This multilayered synthesis aligned with emergent recommendations for integrating qualitative comparative techniques with RTA to enhance explanatory power as noted by Chan et al. (2025). Data saturation had been reached before analysis commenced. Nonetheless, constant comparison across units and sources ensured that potential disconfirming evidence was actively sought and addressed.

Reliability and Validity

Reliability

Reliability in qualitative inquiry, often labeled dependability, concerns the extent to which analytic procedures were transparent, traceable, and logically consistent across the life of the project (Noble & Smith, 2025). To establish dependability, I maintained a real-time audit trail composed of GitLab commit histories, dated decision logs, and reflexive journal entries. These records established an auditable trail that would permit external reviewers to reconstruct every coding and theme-generation step, consistent with best-practice guidance for digital audit documentation (Jackson & Bazeley, 2023). Consistency was further reinforced through a code–recode procedure. Two weeks after the initial coding cycle, I recoded 20% of the transcripts and compared results. Agreement exceeded 90%, indicating stability of the analytic lens. Triangulation across interview transcripts, governance dashboards, and postimplementation reports added an additional reliability check by corroborating patterns in independent data streams. Together, the audit trail, code–recode exercise, and data-source triangulation provided a coherent strategy for demonstrating the consistency and replicability of analytic outcomes.

Validity

Validity in qualitative research is operationalized as credibility, transferability, and confirmability (Ahmed & Ishtiaq, 2021). This construct was addressed through multiple overlapping tactics. Credibility was enhanced via iterative member checking. Each participant reviewed both transcripts and one-page analytic memos and confirmed

their accuracy or suggested minor wording clarifications. Transferability was supported by a thick, contextual description of the case organization's structure, BPO governance model, and external operating environment, enabling readers to judge the applicability of findings to analogous settings.

To achieve confirmability, I stored reflexive memos alongside coding decisions in NVivo, creating a transparent linkage between data excerpts and interpretive claims. Negative-case analysis (actively searching for disconfirming evidence) was documented in the audit trail and integrated into theme refinement. Finally, a peer debrief with an external qualitative-methods scholar provided an independent challenge to emergent interpretations and helped surface any residual researcher bias. To ensure saturation in this interview-based case study, I monitored for both code saturation (no new first-order codes) and meaning saturation (no new insights about existing codes) using a running codebook. Saturation was observed after the eighth interview, and two additional interviews were completed to confirm stability, with triangulation against organizational documents and governance dashboards, and documentation of decisions in the audit trail.

Credibility

Credibility, the extent to which the study's findings accurately represent participants' perspectives, was strengthened primarily through prolonged engagement, data triangulation, member checking, and peer debriefing. Prolonged engagement was achieved by spending 6 weeks immersed in the focal organization's documentation, allowing me to appreciate contextual details that surfaced during interviews.

Triangulation entailed combining semistructured Zoom interviews with 10 executives, 7

postimplementation reports, and 3 quarterly governance dashboards, enabling convergence of evidence and reducing single-source bias, as cautioned by Dearing and Lei (2021). After each interview was transcribed, participants reviewed their transcript and a summary of preliminary codes within 3 days, confirming factual accuracy and interpretive resonance, a form of member checking that contemporary methodological scholarship (see Scharp & Sanders, 2022) identifies as the gold standard for enhancing credibility. Weekly peer-debriefing sessions with an experienced qualitative scholar further challenged emerging interpretations and minimized investigator bias.

Transferability

Transferability, or the degree to which findings may be applied to other contexts, was supported by a thick, rich description of the organizational setting, participant roles, and BPO project characteristics. Detailed portrayals of vendor-governance structures, performance-metric frameworks, and leadership decision routines allow readers to assess the applicability of results to their own environments. Recent guidance emphasizes that such contextual specificity, rather than statistical representativeness, is the principal aspect of transferability in qualitative research (Cope & Baylis, 2023). By bounding the case to the years 2021 to 2023 and geographically (southeastern United States) and by specifying inclusion criteria for executive participants, the project provided clear parameters against which future researchers or practitioners may judge relevance.

Confirmability

Confirmability, the criterion concerned with neutrality, was enhanced through reflexive journaling, triangulation of data sources, and maintenance of the audit trail. I

kept a structured reflexive journal that captured assumptions, emotional reactions, and methodological choices immediately after each interview and during coding sessions. This practice aligned with recent calls for reflexivity (see Peddle, 2021) as an ongoing, multilayered activity that centers participants' voices over researchers' preconceptions. Triangulating interviews with authenticated organizational artifacts further reduced the likelihood that findings reflected researcher bias rather than participant realities. Finally, storing raw data, analytic memos, and decision logs together will allow future auditors to retrace interpretive steps, thereby substantiating confirmability.

Transition and Summary

In Section 2, I detailed every procedural element that shaped the completed qualitative single-case study. I began by justifying the choice of a qualitative approach and a single-case design, which enabled an in-depth exploration of how executive leaders managed third-party service providers during recent business-process outsourcing initiatives. Ten senior executives from one United States organization formed the purposive sample, a size that achieved thematic saturation while preserving contextual coherence. Ethical integrity was safeguarded through Institutional Review Board approval, tele-consent, modest incentives, and encrypted data-handling protocols.

Data collection progressed through four sequential phases: (a) invitation and scheduling, (b) semistructured Zoom interviews, (c) gathering of organizational artifacts, and (d) member checking. All materials were organized with rigorous file-naming conventions, redundant encrypted storage, and a transparent audit trail maintained in NVivo 14 and GitLab. A six-phase reflexive thematic analysis, supported by code–recode

checks, triangulation, and negative-case analysis, produced a dependable and confirmable chain of evidence. I also explained how credibility, transferability, dependability, and confirmability were strengthened through member checking, thick description, audit documentation, and peer debriefing. In Section 3 that follows, a presentation of the project's findings, an analysis of how those findings relate to the existing body of knowledge on BPO leadership, and a discussion of their implications for professional practice and positive social change are provided.

Section 3: Application for Professional Practice and Implications for Social Change

Introduction

The purpose of this qualitative single case study was to explore the effective strategies that some executive leaders used to lead successful BPO initiatives. The findings revealed five key themes. The first theme showed that executive leaders conducted comprehensive vendor selection and onboarding to minimize risks, emphasizing the importance of thorough vendor vetting, contract safeguards, and engaging stakeholders throughout the process. The second theme revealed that leaders focused on building strong relationships with vendors from the initiation stage, ensuring shared values and alignment on strategic objectives. The third theme indicated that leaders measured both quantitative and qualitative performance metrics to assess the effectiveness of their strategies. The fourth theme highlighted the challenges faced during the implementation phase, including internal resistance, misaligned expectations, and difficulties with system integration. The fifth theme highlighted the importance of essential leadership capabilities, including strategic communication, emotional intelligence, decisive decision-making, cross-functional collaboration, cultural intelligence, vision setting, and resilience, which played a pivotal role in driving the success of BPO initiatives.

Presentation of Findings

This study was guided by a single research question: What strategies do executive leaders employ to lead successful BPO initiatives? Five themes emerged after the analysis, all of which addressed this research question. The themes were as follows: (a)

vendor selection and onboarding, (b) vendor relationship management, (c) performance measurement and continuous assessment, (d) implementation frictions, and (e) leadership capabilities.

Theme 1: Vendor Selection and Onboarding

Data supporting the first theme were derived from all 10 participants. This finding indicated that executive business leaders conduct comprehensive vendor assessments to select the most appropriate external providers as a way of minimizing risks. The finding also showed that executive business leaders facilitate contract structuring and onboarding processes by engaging relevant stakeholders to reduce risks. Participant 6 explained that the measures implemented to reduce risk when recruiting external service providers entailed detailed vendor evaluation and contractual oversight. The participant and his team ensured that they communicated effectively with the vendors to prevent the occurrence of any problems, stating:

All risk control methods we implement combine thorough vendor evaluation with contractual oversight, as well as progressive team integration steps and multi-dimensional communication structures supplemented by instant performance metrics. BPO risk management goes beyond the prevention of all problems because organizations need established systems to detect problems promptly and respond swiftly.

Participant 7 mentioned that they conduct onboarding of vendors at different intervals. The first phase entails having a segment of the client on board and delaying expansion to identify challenges and resolve them before bringing the other client

segments on board. The participant noted that staggered onboarding helped them identify an improved checklist to use when onboarding other teams, stating:

For us, another important risk control is staggered onboarding, particularly with high-impact functions. So, we start with a pilot cell, typically one region or one client segment, and delay expansion only after we've ironed out any bumps. Our healthcare division was the first to transition to have our client onboarding paperwork processing moved to a BPO partner in Alabama. When we jumped into testing with field reps, some of them were still using outdated intake forms, data that was not validated by our BPO team. That pilot period gave us time to modify the training and agree on a checklist before rolling it out to other teams.

Participant 9 elaborated that they use a strategy that entails four steps, including comprehensive vendor vetting, whereby they check capabilities, pricing, financial health, data protection standards, among other factors, to choose the best vendors. The participant mentioned that they conduct contract safeguards, structured onboarding, and continuous oversight of the vendors, stating:

What I would say is our four-part strategy includes thorough vendor vetting, contract safeguards, structured vendor onboarding, and continuous oversight. Comprehensive vendor due diligence is the first step, and arguably the most important. Our scope isn't limited to just reviewing capabilities and pricing, we also look at financial health, data protection standards, past compliance issues, scalability, and finally, cultural fit. I know for a fact that technological capabilities alone are not a guarantee of a successful relationship.

The first theme showed that executive business leaders conducted a comprehensive vendor assessment to select the most appropriate external providers to minimize risks. The participants emphasized the importance of a structured onboarding process to ensure that external service providers integrated seamlessly with internal teams, thereby minimizing risk. The participants also discussed identifying and addressing problems prior to onboarding to ensure a smooth handover process. Participant 6 emphasized that their risk control methods included detailed vendor evaluation, contractual oversight, and progressive integration supported by real-time performance metrics. Participants also facilitated contract structuring and onboarding processes by engaging relevant stakeholders. Participant 7 described how staggered onboarding, beginning with one region or client segment, helped surface early-stage issues, allowing adjustments before broader rollout.

These practices aligned with the work of Ejechi et al. (2020), who emphasized the importance of conducting detailed vendor investigations to mitigate the risks associated with outsourcing. Additionally, the leaders focused on strategic onboarding, with an emphasis on engaging relevant stakeholders and utilizing staggered vendor integration to proactively manage risks. This finding was also consistent with Kompella (2021), who highlighted that well-structured transitional and onboarding workflows enable BPO teams to focus their efforts effectively on new partners and align their practices with the expectations of the organization they are supporting.

In the context of the dynamic capabilities theory (Teece, 2022), these vendor selection and onboarding processes represented critical adaptive routines. Dynamic

capabilities theory underscores how organizations must sense and seize opportunities while continuously reconfiguring their processes and resources to stay competitive. By carefully selecting vendors and structuring onboarding in a phased manner, organizations demonstrate the capacity to adapt and recalibrate their strategies, ensuring that they are prepared to meet the challenges posed by outsourcing relationships. The findings also aligned with the self-determination theory (Deci & Ryan, 2023), particularly in how leaders fostered a sense of competence and relatedness with vendors. The engagement of relevant stakeholders and the focus on mutual understanding and shared values during the onboarding process aligned with the psychological needs that contribute to motivation and positive collaboration, thus ensuring that both parties are aligned and committed to the BPO initiative.

Participant 9 reinforced this by outlining a four-part strategy: vendor vetting, contract safeguards, structured onboarding, and continuous oversight, stressing that capabilities, data protection, and cultural fit were crucial for minimizing risk. Based on the outcomes of the current investigation, executive business leaders conducted thorough vendor selection and strategic onboarding as ways of minimizing risks.

Theme 1 findings both corroborate and sharpen prior evidence and also extend the field's guidance on how to reduce outsourcing risk. They confirm earlier work showing that rigorous pre-award diligence and well-structured transitions lower failure risk in BPO, including detailed partner vetting and explicit onboarding workflows (Ejechi et al., 2020; Kompella, 2021). They extend this knowledge by specifying the risk controls that mattered most in practice, including financial health checks, data-protection audits, and

cultural-fit assessment, aligning with recent vendor-selection research that formalizes multi-criteria frameworks and emphasizes conflict and inconsistency removal to improve decision quality (Rani et al., 2024). They also converge with new procurement risk evidence showing that embedding risk-management routines into contracting and early rollout reduces downstream disruption in technology services (Harju et al., 2024). In addition, the emphasis on cultural fit and staggered onboarding adds to emerging leadership and team literature by indicating that collective cultural intelligence and early alignment behaviors can smooth cross-boundary integration during outsourcing handovers (Liao et al., 2025). Finally, these results challenge cost or capability-only selection logics by demonstrating that technical prowess and price are insufficient predictors of success without governance safeguards and phased integration, thereby refining earlier sourcing perspectives that prioritized cost and core-competency rationales (Asatiani et al., 2019).

Theme 2: Vendor Relationship Management

Data supporting the second theme were derived from all 10 participants. This finding indicated that executive business leaders developed strong, trust-based relationships with vendors to reduce the risk of failure in BPO initiatives. The participants reported that they developed these relationships by establishing shared values. The participants also talked about developing good relationships with vendors during the early stage of project initiation.

Participant 2 explained that building a relationship with vendors from the early stages of project initiation significantly contributed to success. The participant

emphasized the need to establish a deep mutual understanding. They mentioned that leadership from both sides met to discuss strategic plans, essential values, development areas, and performance expectations, thereby strengthening the relationship. The participant stated:

In my professional experience, relationship development with vendors starting at the project initiation stage stands as one of the best methods for success. Real success in outsourcing emerges when providers establish a deep understanding of each other that surpasses the boundaries of their contractual agreements. The onboarding process includes a vision alignment session at [Company Name], which we conduct for all new team members. The SLA review process does not match the extent of this assessment. Our team meets virtually with the provider's leadership group to disclose our organization's strategic plans while explaining both our corporate ethos and services, in addition to the BPO project's meaning for our organization. We expect providers to disclose their essential values along with their development areas and performance requirements toward our organization. Such alignment through discussion establishes a platform for collaborative work dynamics between parties.

Participant 5 explained that the last step in their hiring process for an external service provider is conducting continuous performance assessment and relationship governance. The participant mentioned that they use qualitative data along with SLA reports to evaluate vendor performance during monthly meetings. The internal team that interacts with vendors provides daily feedback on their performance, stating:

The final component of our systems includes continuous performance management together with relationship governance. Merging quantitative data from dashboards with SLA reports allows us to also engage in monthly meetings with vendors for qualitative performance evaluations. Internal stakeholders who encounter the provider every day offer feedback on our performance management process.

Participant 8 elaborated that they spent more time and effort on building relationships with vendors. The participant's team collaborates with the vendors' leadership team by discussing various aspects and celebrating together. The closeness and interaction with the vendors influence them to invest more, enhancing engagement and improving satisfaction, stating:

We poured real energy into cultivating relationships with our vendors. We bring their leadership to strategy offsites, share elements of our internal business roadmap, and invite them into celebration moments. Vendors who feel like partners, as opposed to just providers, invest in our success, which reduces the behavioral risk of complacency or disengagement.

This finding indicated that executive business leaders build relationships with vendors to reduce risk occurrence. The participants engage with vendors' leadership teams to discuss strategic plans, thereby improving collaboration. By strengthening relational capital, leaders lowered coordination risk and improved collaboration quality during the BPO initiative establishment. Participant 2 emphasized the importance of relationship building from the project initiation phase, highlighting collaborative strategic

planning sessions and the exchange of values between leadership teams. This result aligned with research findings by Oshri et al. (2015), who noted that the capacity to accomplish strategic innovation through outsourcing engagements was positively impacted by superior relationships between BPO providers and organizational leaders. According to Charles and Ochieng (2023), strengthening the relationship with BPO providers benefits firms, as all parties work toward shared goals, an outcome that corroborates the current investigation's results. H. C. U. Mondejar and Asio (2023) noted that when firms and BPO partners take their relationship seriously, they can maximize the benefits, an outcome that echoed the current project's findings. Asada et al. (2020) revealed that firm executives can welcome ideas and suggestions from their partners to strengthen the relationship, an outcome that corroborated the current research results. Participant 8 supported this notion by describing how their team celebrated successes and built rapport with vendors' leadership to foster loyalty and engagement.

Abdulsalam and Hedabou (2021) asserted that businesses can reduce their exposure to risks by conducting thorough assessments of outsourcing partners' security procedures, implementing comprehensive data-protection processes, and verifying compliance with privacy laws, an assertion that agreed with the current project's findings. Participant 5 stated that their organization relied on both quantitative and qualitative methods, including feedback from internal staff and service-level agreement (SLA) reports, for continuous vendor performance assessments. Wang et al. (2021) stated that identifying a BPO provider relevant to outsourcing processes requires extensive effort, an outcome that agrees with the current research findings. According to Liu et al. (2023),

selecting the right BPO provider requires significant effort from firms to achieve desired outcomes, an outcome aligned with the current investigation. Charles and Ochieng (2023) determined that firms must ensure their BPO partners align with the firms' strategic goals and objectives, an outcome consistent with the current project's findings. Based on the findings of the current project, executive business leaders built relationships with vendors and continuously assessed vendor performance to minimize risks.

Theme 2 results confirmed longstanding evidence that high-quality vendor relationships improve outsourcing outcomes, but they also extended the literature by specifying the routines that matter most and by integrating newer relationship-governance insights. Consistent with prior work, early alignment on values and objectives, frequent joint reviews, and open information exchange were associated with lower coordination risk and stronger performance (Charles & Ochieng, 2023; Oshri et al., 2015). The findings extended this knowledge by showing how leaders operationalized relationship quality through structured governance cadences that blended SLA data with qualitative feedback, a practice that mirrors implementation science models of trust-building and co-learning in interorganizational work (Metz et al., 2022). The emphasis participants placed on partnering behaviors that invite vendor input and celebrate milestones also aligned with evidence that executives who welcome ideas from providers strengthen collaboration and innovation under pressure (Asada et al., 2020) and with recent supplier-relationship research indicating that deliberate governance routines and interorganizational learning mechanisms enhance suppliers' innovation contributions (Yang et al., 2023). The findings challenged a contracts-only stance by demonstrating

that formal SLAs are necessary but not sufficient without relationship routines that cultivate mutual understanding and rapid problem resolution (Charles & Ochieng, 2023).

The results related directly to the project's conceptual frameworks. From a dynamic capabilities perspective, early vision alignment, recurring governance meetings, and bidirectional feedback are coordination and learning microfoundations that help leaders sense emerging issues, seize opportunities for adjustment, and reconfigure processes with the vendor in real time (Teece, 2022; Yang et al., 2023). From a self-determination perspective, the same relationship practices satisfy core psychological needs: relatedness through trust and shared values, competence through timely, constructive feedback, and autonomy through clearly negotiated decision rights, conditions that sustain motivation and cooperative behavior across organizational boundaries during BPO implementation (Deci & Ryan, 2023; Metz et al., 2022). In this way, the study integrates DCT's structural explanation of how firms adapt with SDT's motivational account of why people commit to that adaptation, clarifying how relational governance converts vendor ties into resilient, performance-enhancing partnerships.

Theme 3: Performance Measurement and Continuous Assessment

Data supporting the third theme were derived from all 10 participants' accounts. This finding indicated that executive business leaders measured both quantitative and qualitative performance metrics to determine the effectiveness of the strategies used to minimize risks. Some of the quantitative metrics measured included service-level agreement (SLA) adherence, key performance indicators (KPIs), and strategic alignment. Managers also collected verbal feedback from internal employees and external

stakeholders on qualitative indicators, such as employee engagement, stakeholder satisfaction, and cultural fit.

Participant 1 explained that relying solely on quantitative indicators did not provide accurate results. The participant noted that they also measured qualitative indicators, such as internal stakeholder satisfaction, employee engagement, and cultural fit between vendors and the team. Combining both types of metrics resulted in better outcomes, stating:

However, it's not always easy to paint a clear picture using only numbers. On top of quantitative indicators, we also watch qualitative ones... things like internal stakeholder satisfaction, employee engagement, and even cultural fit between our teams and the vendor. This HR helpdesk project taught us one of our biggest lessons... We certainly weren't hitting our quantitative metrics, but employee feedback consistently stated that the support employees received was impersonal or too scripted. And it wasn't the kind of 'HR experience' they were accustomed to.

Participant 5 explained that the information gathered from internal stakeholders was extremely helpful. The participant mentioned that feedback was collected quarterly through short surveys conducted by the internal team. In addition to interview accounts, this claim was triangulated with organizational artifacts and routine governance materials. The internal team's quarterly pulse surveys, focused on communication clarity, service quality, turnaround time, and overall satisfaction, were described by participants and corroborated through member checking and the study's artifact review process,

which included authenticated post-implementation reports and governance dashboards used to monitor vendor performance over time. Quarterly pulse surveys and governance dashboards also surfaced unexpected challenges. An example was spikes in rework after a release or delays linked to vendor turnover, which triggered targeted corrective actions. Leaders responded by tightening SLA review cycles, instituting daily stand-ups during incident windows, and staging limited rollbacks or parallel runs until metrics and qualitative feedback signaled recovery, illustrating how continuous assessment and resilient response operated in tandem. These multiple evidence streams, combined with transcript verification by participants, substantiated that the short surveys were in fact conducted and used as an input to ongoing performance calibration and course correction during BPO implementation. These surveys focused on aspects such as quality of services, communication clarity, and satisfaction, stating:

Second, internal stakeholder feedback is another layer we use, and it has yielded some of our most valuable insights. Once every quarter, we reach out to the internal teams that work with the outsourced functions with a short survey. We ask them about communication clarity, service quality, turnaround time, and overall satisfaction.

Participant 9 elaborated that they determine the effectiveness of risk-minimization strategies by measuring quantitative, qualitative, and strategic impact metrics. The participant stated that measuring one type alone offers a limited perspective, whereas combining multiple measures provides a more comprehensive view, stating:

I think success in BPO initiatives is not simply about ticking off tasks done or PMAs met. Based on our experience, we've had to expand our measurement approach to a blend of quantitative, qualitative, and strategic impact metrics. When taken separately, each one offers a different lens, and taken together, they provide a well-rounded view of whether our strategies are actually working.

This finding showed that the effectiveness of risk-reduction strategies is evaluated by measuring both quantitative and qualitative indicators. Quantitative indicators include SLA adherence, KPIs, cost savings, turnaround times, accuracy rates, strategic alignment, risk reduction, and resource allocation. Qualitative indicators include stakeholder satisfaction, employee engagement, and cultural fit. This finding supported research outcomes by Yoshino et al. (2021), who stated that when firms define their goals, they identify tangible outcomes, making success and progress measurable against desired results. In the current project, using both quantitative and qualitative metrics enabled leaders to capture a more comprehensive view of organizational performance. Participant 1 emphasized that while quantitative data, such as SLA adherence, were useful, such data often lacked context.

The participant talked about the need to assess cultural fit and employee engagement to fully understand service effectiveness. Participants noted that relying solely on quantitative data, including KPIs or SLA adherence, often failed to capture the full picture of strategy effectiveness. For instance, Participant 5 reported that internal stakeholder surveys conducted quarterly on communication clarity, service quality, and satisfaction revealed critical performance gaps that numbers alone could not show.

Participant 9 further reinforced the importance of a blended approach by stating that combining quantitative, qualitative, and strategic impact metrics provided a more accurate picture of whether risk-minimization strategies were working. By incorporating qualitative insights, such as feedback on cultural fit and communication quality, leaders reported gaining a more holistic understanding of their strategic outcomes, enabling more informed decisions.

The findings from Theme 3 confirmed and extended the existing literature on the importance of both quantitative and qualitative performance metrics in managing BPO initiatives. Previous studies have emphasized the need to use key performance indicators (KPIs) and service-level agreements (SLAs) to measure BPO effectiveness (Yoshino et al., 2021). However, the current study expands upon this by incorporating qualitative indicators such as employee engagement, stakeholder satisfaction, and cultural fit, which many previous studies have underemphasized (Giamos et al., 2023). By combining both types of metrics, leaders were able to capture a more comprehensive view of BPO performance, aligning with recent research that underscores the value of integrating quantitative and qualitative measures for a more accurate evaluation of strategic outcomes (Sörensen & Etter, 2024). The findings also extended the understanding of performance management by illustrating how continuous assessment, through quarterly surveys and governance dashboards, can detect and address challenges in real-time, as seen in Participant 9's comments about the blend of quantitative, qualitative, and strategic impact metrics. This builds on the work of Liu et al. (2023) and Wang et al. (2021), who argued that effective BPO management requires ongoing monitoring and adaptation to

changing circumstances, which was also reflected in the participants' use of performance reviews and feedback loops.

These findings related directly to the conceptual frameworks of dynamic capabilities theory (DCT) and self-determination theory (SDT). From a dynamic capabilities perspective, the use of both quantitative and qualitative performance data represents a key adaptive routine, where organizations sense issues such as cultural misalignment or vendor dissatisfaction and respond by adjusting strategies or processes (Teece, 2022). The continuous assessment of BPO performance through multiple lenses demonstrated how organizations recalibrate their approach in response to evolving challenges and opportunities, aligning with the dynamic capabilities framework that emphasizes continuous adaptation and resource reconfiguration. From an SDT perspective, qualitative indicators, such as cultural fit and stakeholder satisfaction, contribute to fulfilling the psychological needs of autonomy, competence, and relatedness. These factors are essential for maintaining motivation and engagement among internal employees and external vendors, as they ensure that both parties feel competent and valued in the BPO relationship (Deci & Ryan, 2023). Thus, the findings not only confirmed previous literature but also highlighted the critical role of both qualitative and quantitative assessments in fostering an adaptive, motivated, and collaborative environment in BPO initiatives.

Theme 4: Implementation Frictions

All the participants contributed to this theme. This finding indicated that the implementation phase of the BPO initiative was adversely affected by internal resistance

from employees, in which employees refused to embrace modifications. The participants also mentioned that misalignment in expectations negatively affected the implementation of the BPO initiative, with vendors maintaining different expectations about their projects. The finding further indicated that challenges in system and data integration, due to technology compatibility issues, contributed to a lack of success in implementing the BPO initiative during the early stages.

Participant 1 explained that resistance within the internal team is a key challenge when implementing BPO. Employees fear being laid off and losing control over their responsibilities when a new business-related element is introduced, stating:

Internal resistance is one of the most significant and recurring challenges. When you're introducing anything BPO, and it's in areas of the business that are customer-oriented or close to your core business, a natural fear lurks. 'We're worried that we're losing control over how we work, or even if we'll have a job.' Even without actually planning to do layoffs, just the perception can cause serious morale issues.

Participant 2 elaborated that a lack of alignment in expectations between internal teams and external providers adversely affects the success of BPO implementation. Vendors may maintain different expectations, which interfere with role clarity and team collaboration, stating:

Vendor misalignment becomes a difficult matter to handle because providers maintain priorities that differ from ours. A vendor may fulfill all specified contractual SLAs and show technical ability, but remain unaware of our business

purposes while skipping important cultural elements. An unstable connection generates difficulties between us.

Participant 10 elaborated that system integration challenges adversely affected the operations of both organizations. The participant shared an example of how an invoice automation project initially failed. After a middleware platform was constructed, costing additional time and resources, operational alignment was achieved. The participant emphasized the need for proper interconnection capabilities in information systems, stating:

Again, system integration emerges as a regular obstacle for organizations in their operations. Both parties often encounter difficulties when attempting to synchronize their platforms despite having qualified IT support personnel. The BPO invoice automation project suffered from a failure between our ERP system and the vendor's reporting infrastructure to complete a smooth synchronization. The first data discrepancies appeared immediately after implementation. We constructed a middleware platform to achieve connectivity between systems, which forced us to allocate extra time and financial resources to the project. Immediately after that situation, we started performing technical dry runs before contracts were finalized to demonstrate how important backend integration really is. A properly aligned process becomes useless unless information systems maintain proper interconnection capabilities.

This theme showed that resistance within internal teams adversely affects the implementation of BPO initiatives during the early stages. The participants noted that

misaligned expectations with vendors also negatively impact implementation.

Additionally, technical issues, particularly system and data integration challenges, present barriers to the successful execution of BPO initiatives. Leaders overcame resistance by enhancing technology compatibility, better communication with teams, stakeholder mapping, and encouraging collaboration among the teams.

Beyond identifying resistance, expectation gaps, and integration defects as early barriers, participants described concrete strategies they used to overcome these issues and keep initiatives on track. Managers countered internal resistance by leading with strategic communication and vision-setting, explaining the “why,” the intended end state, and role impacts, paired with regular, structured updates to reduce speculation and disengagement. Several of them emphasized that clarity and cadence of messaging were decisive in calming anxieties and rebuilding cooperation. They also stood up cross-functional working groups (HR, finance, IT, compliance) and designated internal champions to co-design workflows with the vendor, which improved ownership and sped problem resolution across silos. To realign expectations with providers and internal teams, leaders held early alignment sessions and monthly governance reviews, used shared scorecards, and opened rapid feedback channels, including quarterly pulse surveys, so pain points surfaced quickly and could be addressed before they spread. For technical frictions, managers ran pre-go-live dry runs and parallel processing pilots, and in one case, convened a joint war room to deploy a middleware bridge, accepting a longer resolution path in exchange for dependable synchronization and a cleaner rollout. These routines

were repeatedly cited as the ways managers converted early resistance into participation and ultimately sustained momentum toward successful BPO implementation.

This finding aligned with research outcomes by Cragg and Chraibi (2020), who determined that without an effective change management plan, outsourcing can lead to resistance to change, loss of provision, and communication breakdowns. Vasani et al. (2019) noted that it is common for people to resist new initiatives, especially when they do not understand the benefits or feel excluded from the change plan, an outcome that corroborated the current investigation's results. Participant 1 echoed this challenge by highlighting that internal team members often feared job loss or loss of control, which severely affected morale and cooperation during implementation.

Charles and Ochieng (2023) highlighted how expectation misalignments arise, noting that BPO is risky and can adversely affect organizational profitability, even as firms expect BPO providers to transform their operations. Participant 2 reinforced this assertion by stating that vendors often prioritized different objectives and lacked cultural understanding, resulting in instability and strained collaboration. According to Van Looy (2021), communication difficulties caused by language barriers can lead to misunderstandings and mismatched expectations, a finding that echoed the current project's findings. Prajapati et al. (2020) noted that significant outsourcing in a specific function harmed organizations' integrative capabilities and competitive position, an outcome that corroborated the current research findings. Charles and Ochieng (2023) found that the outsourcing process involves delegating specific functions that may affect existing systems, processes, and structures in firms, an outcome consistent with the

current project's findings on system integration challenges. Participant 10 illustrated this by describing how system incompatibility during an invoice automation project led to data discrepancies and forced the organization to invest in a middleware platform to restore functionality. Based on the outcomes of the current project, the implementation phase of the BPO initiative was adversely affected by internal resistance from employees, expectation misalignments, and system integration challenges.

The findings from Theme 4 confirmed and extended existing knowledge on the challenges of implementing BPO initiatives, particularly regarding internal resistance, misaligned expectations, and system integration issues. The literature consistently highlights that resistance to change is one of the most significant barriers in outsourcing (Cragg & Chraibi, 2020; Vasan et al., 2019). The study's findings supported this, illustrating that fear of job loss and loss of control were major sources of internal resistance, as noted by Participant 1. However, the current study extends this knowledge by specifying the strategies used by leaders to mitigate resistance, such as strategic communication, vision-setting, and the formation of cross-functional working groups. These findings build upon Vasan et al. (2019), who emphasized the importance of clear communication and employee involvement in overcoming resistance to change. Additionally, the study extends Charles and Ochieng's (2023) work on expectation misalignments, showing that misaligned priorities between internal teams and vendors can strain collaboration, especially when vendors lack cultural understanding. This reinforces the idea that managing cultural fit and aligning expectations early in the process is essential for BPO success.

Furthermore, the findings align with recent studies that focus on the importance of preemptively addressing technical integration issues. The work of Van Looy (2021) and Prajapati et al. (2020) supports the assertion that system and data integration challenges often derail BPO initiatives, and the current study extends this by highlighting specific methods, such as pre-go-live dry runs, middleware solutions, and parallel processing pilots, that managers used to address these issues. These practical solutions, discussed by Participant 10, echo findings in more recent research, such as those by Harju et al. (2024), who argued that preemptive testing and technical readiness are critical to ensuring smooth system integration and mitigating risks.

These findings tie directly to the conceptual frameworks of dynamic capabilities theory (DCT) and self-determination theory (SDT). From a DCT perspective, the study's findings reflect how organizations adapt to challenges by reconfiguring resources, such as deploying middleware solutions and organizing cross-functional teams, which allow them to respond to disruptions and recalibrate their strategies (Teece, 2022). The proactive actions of leaders in managing internal resistance and expectation misalignment demonstrate the agility required to adjust strategies during implementation. From the SDT framework, the study illustrates how leadership behaviors help satisfy psychological needs for competence, autonomy, and relatedness. By providing clarity and control over the process, leaders enhanced motivation and reduced resistance, which aligns with SDT's emphasis on fostering intrinsic motivation through collaborative engagement and supportive leadership (Deci & Ryan, 2023). Thus, the findings not only confirm previous

studies but also integrate DCT and SDT to explain how effective leadership and adaptive processes contribute to overcoming the barriers identified in BPO implementation.

Theme 5: Leadership Capabilities

Data supporting this theme were drawn from all the participants. The finding indicated that strategic communication is a core leadership and management skill that significantly matters during BPO initiative establishment. The finding also indicated that executive business leaders practice emotional intelligence and decision-making skills during the BPO initiative establishment. Participants further indicated that cross-functional collaboration and cultural intelligence play key roles during BPO initiative implementation. The participants mentioned that vision setting and resilience are essential leadership abilities practiced to achieve the success of the BPO initiatives.

Participant 5 discussed the importance of emotional intelligence when dealing with employees, especially under internal and external pressure. Handling employees under pressure requires the ability to read emotional cues, even when they are not explicitly expressed. The participant noted that an executive leader must create an environment where people feel comfortable engaging, stating:

Well, I would say emotional intelligence is another essential leadership skill. You have a group of people under pressure, internal pressure, and external pressure. Even under the best circumstances, BPO transitions are disruptive. You need to be able to read a room, identify when someone's not saying everything they should be, and carve out an environment where people feel comfortable opening their mouths.

Participant 6 emphasized cross-functional collaboration across different departments as an essential skill for BPO initiatives. All departments involved in the BPO process should work cohesively, even those that typically function independently, stating:

Cross-functional collaboration represents the next critical skill in business operations. BPO demands collaboration between every operational department, including finance operations, IT, as well as HR, and compliance teams. Your ability to merge efforts between departments should extend to the ones that function separately from each other.

Participant 7 explained that strategic communication in leadership is about creating understanding rather than simply relaying information. Strategic communication requires leaders to explain all aspects of the BPO initiative. A lack of strategic communication can lead to speculation, resistance, or disengagement from the team, stating:

The first is strategic communication. It's not just about sharing information, but shaping understanding. They need to know why they are outsourcing, what the goals are, and the impact on their day-to-day roles. Without that clarity, you land in the dangerous waters of speculation, resistance, and sometimes active disengagement.

Participant 8 stated that executive leaders must quickly assess both risks and opportunities when making decisions. Decision-making agility includes the willingness to change course when necessary. Acting decisively can prevent project failure, stating:

Decision-making agility is another vital skill. In BPO transitions, things move really fast, mostly in the early phases. Quickly assess risks and opportunities and move without paralyzing the team. And it also means being willing to change course when needed. Initially, we scoped a BPO engagement to cover all of our Tier 1 IT tickets.

Participant 10 discussed workplace conflicts that may result from a lack of cultural intelligence. In the third theme, internal resistance, expectation misalignment, and system integration are indeed critical challenges, but the findings showed these were often compounded by a lack of cultural intelligence in cross-functional teams. Participant 10, for example, discussed how a lack of cultural understanding between internal staff and vendors led to workplace conflicts and communication breakdowns, which hindered smooth implementation. This can be seen as a red flag for the need to address cultural intelligence as part of the organizational culture evaluation.

However, it is in Theme 5 that cultural intelligence emerged as a key leadership trait. Leaders who demonstrated cultural awareness were better equipped to handle the intricacies of cross-department collaboration and manage vendor relations effectively. This aligned with the broader leadership capabilities theme, where strategic communication, emotional intelligence, and decision-making agility were identified as essential to overcoming the barriers found in Theme 4. Cultural intelligence, in this sense, functions as an overarching leadership competency that helps leaders prevent conflicts arising from cultural misunderstandings, as seen in the vendor relationship management strategies discussed by other participants. Different organizations have varying

communication styles and hierarchical structures. Failure to recognize cultural practices can lead to misunderstandings, stating:

I consider cultural intelligence to be the essential final leadership ability. You know, many global BPO partners operate in different markets where important communication and feedback practices, as well as hierarchical structures, exist between organizations. Leader negligence regarding cultural subtleties can result in unintentional wrong interpretations of behavior and create unnecessary workplace conflicts.

Participant 6 mentioned that it is important for a leader to clearly explain the rationale and impact of the initiatives to team members. Implementing BPO initiatives creates anxiety, which can be mitigated through vision setting that clarifies the desired end state and how it affects employees' roles. Without such clarity, resistance may arise, stating:

First among these abilities is vision-setting. The process of implementing BPO initiatives results in anxiety primarily because users fail to grasp the underlying reasons for the transformation. To succeed, leaders must explain to employees exactly how the initiative shapes their work environment and what respective positions within the organization will change from the current state to the desired state. A leader's initiative becomes more susceptible to resistance by refusing to clarify the rationale.

Leaders repeatedly framed resilience not as a personal trait in isolation but as a practical leadership routine expressed in the face of unplanned disruptions. When system

outages, integration defects, or slippages in critical milestones occurred, effective managers stayed calm and adaptive, protected momentum with temporary workarounds, tightened communication cadence, and re-sequenced tasks to preserve overall delivery. Participants described this steadiness as essential to stabilizing teams and vendors alike, converting setbacks into learning loops rather than project derailers, and thereby sustaining progress toward BPO goals. Participant 9 highlighted resilience as a key leadership trait during BPO implementation. Unexpected challenges, such as system failures or timeline delays, require a calm and adaptive response to maintain project momentum, stating:

The third is resilience under pressure. It will not be perfect ... things will go wrong, timelines will slip, systems won't sync, and people will make mistakes. Let's get it straight ... you're a leader. You need to stay calm, adaptable, and focused on resolution, not blame. I remember when our document digitization vendor had a system outage during a critical onboarding phase. Rather than panicking, we put a temporary manual process in place, had daily standups with the vendor, and had the system back up within 72 hours. Keeping everything together kept everyone else on track as well.

This finding indicated that strategic communication and clarity are key leadership skills practiced by executive business leaders during BPO initiative implementation. These leaders also apply emotional intelligence and adaptive decision-making skills throughout the process. Furthermore, they demonstrate cross-functional leadership and cultural awareness as part of a holistic approach to BPO initiative establishment. This

finding also revealed that strategic visioning and resilience were essential leadership capabilities applied by executive business leaders during the implementation of BPO initiatives.

This finding aligned with research outcomes by Chatterjee et al. (2024), who noted that firms must identify and implement knowledge-based software solutions that facilitate seamless communication. Puyod and Charoensukmongkol (2019) emphasized the importance of establishing clear communication channels and protocols between outsourcing partners and client organizations, an outcome that echoed the current investigation's findings. According to Dana et al. (2021), strengthening lines of communication between all parties encourages mutual respect and appreciation of cultural differences, an outcome that agreed with the current project's findings. Participant 7 emphasized that strategic communication involves more than just sharing information; it also includes shaping mutual understanding among team members to reduce resistance and disengagement.

Ejechi et al. (2020) noted that implementing strong communication channels, performance indicators, and regular monitoring is essential to ensure that BPO providers maintain the necessary efficiency standards during the outsourcing engagement. This finding aligned with the current project's results on strategic communication. Li and Liu (2021) affirmed that, regarding data protection, firms must clearly define the potential challenges in communication before outsourcing, and BPO partners should adapt to the communication systems and channels that firms provide. The channels used should be those trusted by the firm's management to serve only the purposes for which they have

been designated. These outcomes echoed the current investigation's results on strategic communication. According to Kim and Jung (2022), leaders can ease the transition and reduce stress by maintaining open lines of communication, an outcome that echoed the current investigation's findings. Participant 5 discussed the necessity of emotional intelligence, highlighting how executive leaders must read unspoken cues and foster environments that encourage open communication, especially during high-pressure BPO transitions.

Settembre-Blundo et al. (2021) suggested that the decision-making process enables firms to act on the available information to help achieve their goals, an outcome that corroborated the current research results. According to Poletto et al. (2020), through the decision-making process, firms assess the applicability and relevance of their knowledge to various departments, tasks, and projects within their organizations, an outcome that was in congruence with the current research. H. C. U. Mondejar and Asio (2023) revealed that BPO partners are often involved in the decision-making processes of the firms they engage with alongside their employees, an outcome that echoed the current project's findings.

Leso et al. (2023) explained that BPO partners may combine their subject knowledge with their technological capabilities through cross-functional collaboration, an outcome that was in line with the current investigation's findings. Wipulanusat et al. (2021) also pointed out that the synthesis of information can encourage cross-departmental collaborations by sharing knowledge across departmental teams, which supported the current research findings. Participant 6 stressed that successful BPO efforts

require cross-functional collaboration across departments, such as HR, finance, IT, and compliance, even when those departments typically operate in silos.

Khan et al. (2022) explained that organizations should invest in cross-cultural training programs to enhance cultural awareness and promote effective collaboration between teams from different backgrounds. This strategy can help overcome communication and cultural barriers, ensuring smooth and successful BPO experiences. This result supported the current project's findings on fostering strategic communication and cultural intelligence skills. Participant 10 supported this finding by explaining that cultural intelligence is critical to avoiding miscommunication and workplace conflict, especially when working with global BPO partners with different communication norms and organizational hierarchies. Based on the findings of the current research, strategic communication, emotional intelligence, decision-making, cross-functional collaboration, and cultural intelligence skills mattered during BPO initiative establishment.

Langley et al. (2023) argued that effective business goals must be set and defined with clarity. Participant 6 reinforced this by highlighting that vision setting helped reduce team anxiety by clearly explaining the rationale and impact of BPO initiatives on employee roles, thereby mitigating resistance. According to Altman et al. (2020), when there is clarity on the workflow between teams in firms and BPO providers, it is easier for BPO providers to know what they are supposed to do, an outcome that corroborated the current investigation's findings. Participant 10 affirmed this by emphasizing that communication clarity requires structured communication plans to ensure that every team

member, including the BPO partner, receives consistent and timely messages, which reduces resistance and confusion.

Poleto et al. (2020) noted that decision-making within organizations, after optimizing knowledge, must be maximized to meet business objectives, an outcome that agreed with the current investigation's findings. Participant 7 echoed this sentiment by noting that leaders must make sound decisions even under ambiguity and without full information, especially when unexpected problems arise. Participant 9 also stressed the importance of resilience, stating that leaders must remain calm and resolution-focused during setbacks, such as system failures or delays to maintain project momentum. Participant 2 added that empathy is a critical leadership trait, especially during outsourcing transitions, as it helps both internal staff and external collaborators feel valued and less vulnerable. Based on the findings of the current research, vision setting, resilience, empathy, communication clarity, and decision-making were the most essential leadership abilities.

The five themes aligned with the conceptual underpinnings of both DCT and SDT. DCT, as proposed by Teece (2022), provides a strategic lens to understand how executive leaders reconfigure resources and competencies to respond to environmental and market shifts. The themes obtained showed that executive business leaders demonstrated dynamic capabilities by adapting to technological, cultural, and organizational challenges inherent in BPO implementation. In Theme 1, participants discussed strategic alignment and organizational agility, whereby leaders ensured readiness for BPO by synchronizing internal processes and stakeholder expectations, core

elements under DCT (Kapoor & Aggarwal, 2020). In the second theme, leaders used collaborative governance and risk mitigation to develop good relationships, an outcome that echoed Chirumalla's (2021) observation that dynamic capabilities are exercised through learning and coordination to manage uncertainty and vendor relationships.

The ability to foster knowledge transfer and learning environments through leadership, as evidenced in Theme 5, reflected DCT's emphasis on innovation and continuous learning (S. Gupta et al., 2020). Business executive leaders demonstrated leadership behaviors that fostered organizational learning through data-driven reflection, feedback interpretation, and strategic refinement. Theme 5 emphasized cultural intelligence, showing how dynamic capabilities, such as sensing and seizing opportunities, could support long-term BPO success (Karimi-Alagheband & Rivard, 2020). SDT enhanced the interpretation of these findings by focusing on how leaders promote autonomy, relatedness, and competence among staff during disruptive transitions like BPO. Also, in the fifth theme, participants mentioned empathy, vision setting, communication, resilience, and decision-making as key leadership capabilities. These capabilities helped meet the psychological needs of internal employees as well as external collaborators (Deci & Ryan, 2023). DCT provided the structural and strategic explanations for how business executive leaders executed successful BPO strategies, while SDT explained the motivational aspects that sustained individual and team-level commitment.

New studies after the writing of the proposal are also included in this project. Careful vendor checks before signing and a phased, structured onboarding confirm and

extent recent research showing that building risk controls into the process cuts the chance and impact of disruptions (Harju et al., 2024). Prioritizing vendor selection and onboarding as one continuous process extends newer research by stressing cultural fit and a disciplined transition, alongside capability and price (Rani et al., 2024). Getting early agreement on vision, agreeing on who decides what, and holding regular joint reviews as measures of developing trust with vendors extends SRM research by showing how day-to-day governance routines support innovation under pressure, beyond basic performance policing (Yang et al., 2023). Using SLAs and KPIs together with stakeholder feedback to steer course corrections confirms that clear goals plus ongoing monitoring improve decisions and results (Sörensen & Etter, 2024). Leaders implementing leadership capabilities, such as vision-setting, strategic communication, emotional intelligence, cross-functional collaboration, decision-making, and cultural intelligence under uncertainty to achieve BPO success, extend emerging leadership research by naming the specific routines that keep teams steady when facing challenges (Liao et al., 2025).

Application to Professional Practice

Managing business-process outsourcing (BPO) requires an emphasis on governance, methods, technology, culture, people, and strategic alignment (Christiansson & Rentzhog, 2019). Although some organizations have realized the importance of BPO, they struggle with implementation due to a lack of understanding (Ejechi & Oshodin, 2019). According to Leo et al. (2022), organizations need to balance pursuing cost-saving initiatives to obtain sustainable performance through BPO while trying to innovate. Without appropriate strategies, organizations may face various challenges, such as

miscommunication, poor vendor selection, and lack of performance monitoring, resulting in project delays, cost overruns, and ultimately, failure to achieve desired outcomes (Harju et al., 2024). This project sheds light on the significance of recognizing BPO as a high-risk strategy that can adversely affect profitability and competitive standing.

Practitioners should operationalize vendor selection and onboarding by going beyond skills and price when vetting a vendor by checking their financial health, data-protection practices, compliance history, ability to scale, and cultural fit. Practitioners should also run a structured onboarding that spells out expectations, roles, and timelines. Rolling out vendors should be done gradually by using a small pilot or staggered onboarding to find problems early and fix them before scaling. Careful vetting and well-managed transitions lower outsourcing risk (Ejechi et al., 2020; Kompella, 2021). Leaders should plan time for readiness checks, like checklists, dry runs, and contract safeguards, and treat onboarding documents as living guides that they update during the first few sprints.

Practitioners should practice vendor relationship management. Practitioners can achieve this by setting up early sessions with vendors to align on vision, talk openly about values and growth areas, define who decides what, and hold regular check-ins to catch issues before they blow up. These habits build trust and make coordination easier; hence, better innovation and results in outsourcing (Asada et al., 2020; Charles & Ochieng, 2023; Oshri et al., 2015). Good vendor relationship management can also be achieved by designing the relationship with clear mechanics, joint reviews, defined

escalation paths, and shared documents, so the partnership holds up under pressure, not just when things are smooth.

Practitioners may practice performance measurement and continuous assessment as part of their daily activities. Leaders should not rely on numbers alone, such as SLA and KPI trends, costs, accuracy, and turnaround time, but instead, they should also include qualitative data to get to know the experiences of vendors and employees by conducting brief surveys, engagement signals, and cultural fit feedback. Combining quantitative and qualitative measurements helps determine whether progress is achieved in the set goals (Yoshino et al., 2021) and that routine monitoring keeps standards high (Ejechi et al., 2020).

Leaders should anticipate and actively manage challenges such as internal resistance, expectation gaps, and system integration defects, instead of treating them as anomalies. Participants associated resistance with loss of control and perceived job insecurity, expectation misalignment to cultural blind spots and unclear scope, and integration challenges to incompatible systems. Leaders should focus on offering solutions by enhancing technological compatibility and advocating for better communication and collaboration among teams.

Practitioners should practice several leadership skills to achieve the success of the BPO initiatives. Leaders need to practice strategic communication with their teams to avoid misinformation and different perspectives on the set goals. Leaders also need emotional intelligence to develop trust and keep teams psychologically safe when implementing different initiatives. When faced with challenges, leaders need to make

decisions that keep momentum among the teams to prevent bigger problems. Leaders need to enact cross-functional collaboration by having all teams work together and develop cultural intelligence to avoid misunderstandings across teams. Leaders who model vision and resilience help teams stay focused in all stages of projects (Chatterjee et al., 2024; Dana et al., 2021; Puyod & Charoensukmongkol, 2019).

Implications for Social Change

Regarding organizational-level positive social change, the findings highlighted several key leadership attributes and strategies. These attributes included emotional intelligence, cultural intelligence, resilience, strategic decision-making, and vision-setting. Meanwhile, the strategies that executives employed included thorough vendor selection, strategic onboarding, relationship building, continuous performance assessment, and the measurement of both quantitative and qualitative metrics. Leadership behaviors such as strategic communication, cross-functional collaboration, and empathy were crucial in ensuring successful BPO outcomes. These capabilities can promote stronger, more open, and adaptive organizational cultures (Mutonyi et al., 2022). If business executives practice inclusive and open communication, emotional intelligence, and clarity in decision-making, they can reduce internal resistance from employees, improve morale, and enhance collaboration with external BPO partners (Coronado-Maldonado & Benítez-Márquez, 2023). Practicing these skills can strengthen organizational resilience during change initiatives and support smoother transitions (Hartwig et al., 2020; Hubbart, 2024).

At the societal level, business executive leaders who demonstrate ethical leadership, foster vendor partnerships, and implement strategic BPO initiatives may influence industry-wide standards for responsible outsourcing. These leaders need to prioritize fair treatment of vendors, communicate decisions openly, and promote cultural understanding so that their practices may become models for other organizations to adopt (Toseef et al., 2022). Taking such steps can lead to better labor practices for employees and vendors, increased cross-organizational collaboration, and improved ethical decision-making (Malik et al., 2022).

The findings contributed to the growing body of literature on outsourcing by offering insights into the practices that facilitate successful BPO implementation. These results are important to the academic field, as they can inform future research. The outcomes can also guide executive leadership development programs by highlighting the specific leadership qualities that are important when navigating BPO challenges. Based on participants' descriptions, such traits include strategic vendor selection, continuous performance monitoring, effective communication, and relationship building.

Recommendations for Action

The following recommendations flow logically from the study's conclusions and offer actionable steps for organizations to improve the success of their business-process outsourcing (BPO) initiatives (Christiansson & Rentzhog, 2019; Leo et al., 2022). First, organizations should institutionalize rigorous vendor selection and phased onboarding as standard practices (Ejechi et al., 2020; Liu et al., 2023). This can be done by creating a vendor evaluation scorecard that measures capabilities, financial health, data protection

practices, compliance history, scalability, and cultural fit (Abdulsalam & Hedabou, 2021). It is essential that organizations require documented checks for each of these factors before making any award decisions (Wang et al., 2021). After vendor selection, onboarding should be structured in phases, starting with a pilot program, then expanding to a limited rollout, and ultimately scaling to full deployment (Kompella, 2021). Clear roles, timelines, and criteria for each phase must be agreed upon by all stakeholders (Gray et al., 2020). Early pilots should be used to identify training gaps, workflow issues, and data challenges before the full-scale rollout begins (Rani et al., 2024).

Second, organizations should prioritize relationship governance with vendors from the very beginning (Oshri et al., 2015). This involves convening alignment sessions between the vendor and client to discuss shared values, strategic objectives, decision-making processes, and escalation paths (Charles & Ochieng, 2023). These sessions should be scheduled at the initiation of the project, followed by monthly governance reviews (Larsen et al., 2023). These reviews should include both performance data and qualitative discussions, ensuring that vendors are seen as partners and that there is mutual accountability throughout the lifecycle (Asada et al., 2020). By inviting vendor leadership to key meetings and celebrating milestones together, organizations can strengthen trust and foster greater transparency in their relationship (Mondejar & Asio, 2023).

Third, organizations should implement a dual-lens performance measurement system that combines both quantitative metrics and qualitative feedback (Yoshino et al., 2021). It is important to track key performance indicators such as service-level adherence, cost, accuracy, and throughput, but also to gather feedback from internal users

and key stakeholders through quarterly surveys (Giamos et al., 2023). These surveys should focus on communication clarity, service quality, and satisfaction (Sörensen & Etter, 2024). The results of both types of data should be presented together on governance dashboards, which can then be used to diagnose root causes and trigger corrective actions when necessary (Zarzycka et al., 2019). For instance, tightening SLA reviews, instituting daily stand-ups during problem periods, and conducting short rollbacks or parallel runs until stability is restored (Van Looy, 2020).

Fourth, organizations should be proactive in addressing implementation frictions by investing in change management and ensuring technical readiness (Cragg & Chraibi, 2020). From the outset, leaders must clearly communicate the “why” behind the outsourcing initiative, as well as the end-state goals and potential role impacts (Arenas et al., 2020). This will help minimize internal resistance (Vasan et al., 2019). Additionally, it is beneficial to designate internal champions and form cross-functional working groups that include representatives from HR, finance, IT, and compliance to co-design workflows and sustain ownership across departments (Wipulanusat et al., 2021). On the technical side, organizations should conduct pre-go-live dry runs, integration tests, and prepare contingency playbooks (Happonen & Siljander, 2020). If technical defects arise, workarounds should be implemented, such as middleware bridges, to keep the project moving forward while the underlying issues are being addressed (Prajapati et al., 2020).

Fifth, organizations should focus on developing leadership capabilities that are essential for successful BPO implementation (Chatterjee et al., 2024). Leaders must be trained in strategic communication, emotional intelligence, cultural intelligence, decision-

making under uncertainty, cross-functional collaboration, vision setting, and resilience (Guzmán-Rodríguez et al., 2023; Puyod & Charoensukmongkol, 2019). These competencies should be embedded in leader performance goals and succession planning processes (Ji et al., 2024). Leaders should also participate in scenario-based exercises that simulate real BPO challenges, such as system outages or vendor turnover, to practice these skills in context (Liao et al., 2025).

The primary audiences for these recommendations are the C-suite sponsors, PMO leaders, vendor management and procurement teams, functional owners in IT, operations, finance, HR, and compliance, and vendor engagement leads (Sibbald et al., 2021). These individuals are responsible for making award decisions, overseeing processes affected by outsourcing, or managing the day-to-day governance that determines whether BPO value is realized (Ge et al., 2021).

To disseminate these results effectively, organizations should deliver findings through various channels (Metz et al., 2022). Executive briefings and standard operating procedure templates should be made available on internal governance sites, while leadership workshops and brown-bag trainings can be organized to walk through the vendor selection scorecard, onboarding plans, and performance measurement systems (Jackson & Bazeley, 2023). Joint client-vendor summits should be arranged to practice alignment rituals and escalation processes (Larsen et al., 2023). Additionally, external dissemination should occur through practitioner articles, conference presentations, and webinars aimed at outsourcing, operations, and project management communities (De Villiers et al., 2022). These dissemination formats align with the methods participants in

the current study used to steer performance, making it easier for other organizations to adopt these recommendations at scale.

Recommendations for Further Research

The use of purposive sampling was a notable limitation of this study, which likely affected the representativeness of the sample. To address this limitation in future studies, researchers could consider using probabilistic sampling techniques, such as simple random sampling, to ensure a more representative sample (Andrade, 2021). This would allow for generalizability of findings across a broader population, increasing the external validity of the results.

Another limitation identified was the potential for social desirability bias, as semistructured interviews may have led participants to provide responses they felt were more acceptable to others, rather than honest ones (Bispo Júnior, 2022). To reduce this bias, future researchers should triangulate data using collection methods less prone to such bias, such as archival documents and direct observation, as these methods allow for a more objective view of the subject matter (Surawy-Stepney et al., 2023).

Recall bias was another limitation of the current study, as the findings were based on participants' retrospective accounts of their BPO initiatives. To minimize this bias, future research could involve longitudinal studies that follow BPO initiatives in real-time, providing a more accurate and immediate understanding of BPO processes and their outcomes.

The present study also focused on business executive leaders in general, without differentiating between leadership levels. Future research could explore how leadership

capabilities and experiences in BPO initiatives vary across different leadership tiers. For instance, comparing the experiences of top executives, middle managers, and lower-level leaders would offer valuable insights into how each level contributes to the success of BPO initiatives.

Additionally, the sample for this study was drawn from a limited geographical region, with participants from Alabama, Tennessee, Florida, Georgia, North Carolina, and South Carolina. In future studies, researchers could expand the sample to include participants from specific sectors or industries, such as healthcare, finance, or manufacturing. This would provide more targeted insights into how leadership capabilities and practices differ based on industry-specific challenges and needs, with a qualitative comparative case study design being ideal for such research.

The findings revealed that internal resistance from employees was a major challenge in the implementation phase of BPO initiatives. Future research could further explore how executives manage internal resistance during BPO transitions. This could involve investigating the strategies leaders use to build trust, communicate change effectively, and maintain employee morale during outsourcing efforts. Qualitative research using in-depth interviews would be particularly useful for understanding these strategies in greater detail.

Finally, the study emphasized the importance of vendor selection and strategic onboarding in minimizing risks. Future research could delve deeper into best practices for vendor selection and onboarding processes. Exploring the most effective methods for

evaluating and onboarding vendors could provide critical insights into how organizations can optimize these phases to ensure the success of their BPO initiatives.

Reflections

The researcher started the DBA Doctoral Study process with certain preconceived ideas shaped by previous experiences in project management and business operations. Specifically, the researcher initially assumed that the key factors influencing the success of business-process outsourcing (BPO) would be related to strict vendor management, technical due diligence, and adherence to service-level agreements (SLAs). These assumptions were rooted in the researcher's experience, where tangible metrics and operational controls were viewed as the primary drivers of success. Recognizing the potential for bias, the researcher engaged in reflexive practices throughout the study, maintaining a journal to document personal assumptions, emotional responses, and any evolving insights that arose from interactions with participants. This reflective process was designed to help bracket potential biases and ensure the findings were grounded in the data rather than preconceived ideas.

As the study progressed, the researcher became increasingly aware of the importance of relational factors, such as trust and communication, in ensuring the success of BPO initiatives. Initially, the researcher may have underemphasized these relational dynamics in favor of more tangible metrics. However, through the interviews and thematic analysis, it became evident that the quality of vendor relationships, cultural fit, and strategic alignment played a critical role in minimizing risks and fostering collaboration. These factors were found to be just as, if not more, important than the

technical and procedural elements traditionally emphasized in BPO success. This shift in understanding was informed by the participants' emphasis on relationship building, proactive communication, and ongoing alignment between vendors and internal teams, which ultimately guided the researcher to revise initial assumptions about what constitutes BPO success.

The researcher also reflected on how their role in the study may have influenced the participants. Given that the research involved executive leaders, there was a potential for participants to alter their responses based on perceived expectations or the status of the researcher. The researcher took several steps to mitigate these potential biases, such as ensuring transparency about the study's objectives, emphasizing the voluntary nature of participation, and reassuring participants that there were no right or wrong answers. Additionally, the use of deidentified data and member-checking allowed participants to review their responses and offer corrections, further ensuring the accuracy and authenticity of the information provided. The researcher also recognized that executive participants, being highly experienced, might have presented information in a way that reflected ideal practices rather than the complete reality. The researcher took care to triangulate the data with organizational artifacts and follow-up questions, which helped to provide a more nuanced understanding of the challenges and solutions participants faced.

As the study concluded, the researcher's thinking evolved in several key ways. First, the realization that BPO success is not solely driven by technical metrics but rather by relational and cultural factors was a significant shift. The researcher began to appreciate that successful BPO requires a blend of technical diligence and strong

interpersonal dynamics, including effective leadership and cross-functional collaboration. Second, the importance of leadership capabilities, such as resilience, emotional intelligence, and cultural intelligence, became clearer. The researcher came to understand that these leadership traits are essential not only for managing vendors but also for fostering an internal culture that supports successful BPO implementation. The researcher's initial focus on operational controls was thus broadened to include the human elements that underpin sustainable outsourcing relationships.

Overall, the DBA Doctoral Study process led to a transformation in the researcher's understanding of BPO success. What began as a focus on technical processes and metrics evolved into a more holistic view that emphasizes the importance of relationship management, leadership capabilities, and organizational culture. The reflexive practices used throughout the study were crucial in challenging initial assumptions and ensuring that the findings were driven by the data rather than preconceived ideas. This process has not only contributed to the researcher's academic development but also enriched their professional practice, reinforcing the importance of adaptability, self-awareness, and openness to new perspectives.

Conclusion

The purpose of this qualitative single-case study was to explore effective strategies that some executive leaders used to lead successful BPO initiatives. Based on the DCT and SDT that guided the project, I anticipated that executive business leaders would leverage dynamic capabilities to adapt while endeavoring to keep their employees and external vendors motivated to enhance engagement and commitment throughout

BPO implementation. This expectation was confirmed by the results, which showed that leaders leveraged dynamic capabilities, such as vision setting, resilience, decision-making under ambiguity, and strategic communication to adapt to changing conditions during BPO implementation. The leaders also reported cultivating motivation and engagement among employees and external vendors by demonstrating empathy, emotional intelligence, clear communication, and relationship building.

Grounded in dynamic capabilities theory (DCT) and self-determination theory (SDT), the five themes can be read as complementary mechanisms by which leaders sense, seize, and reconfigure resources while sustaining the motivation of people who must enact those changes. In Theme 1, rigorous vendor vetting and phased onboarding exemplify DCT's reconfiguration routines, aligning internal processes with external partners, while the onboarding practices that clarify roles and expectations speak to SDT's needs for competence and relatedness that support cooperative engagement. In Theme 2, relationship governance reflects DCT's coordination and learning microfoundations, and the trust-building behaviors that reduce friction map to SDT's relatedness, which strengthens joint problem-solving. In Theme 3, the blend of KPIs, SLAs, and pulse-survey feedback operationalizes DCT's continual sensing and adjustment cycles. Simultaneously, participatory monitoring and timely feedback bolster SDT's competence and autonomy, enabling teams to improve performance without coercion. In Theme 4, resistance, expectation gaps, and integration defects are precisely the disruptions that trigger DCT-consistent resource reconfiguration and sequencing. Leaders mitigate autonomy threats through transparent communication and choice-

supportive change plans that satisfy SDT's autonomy and relatedness needs, reducing defensiveness and restoring momentum. In Theme 5, strategic communication, decision-making agility, cross-functional collaboration, cultural intelligence, vision setting, and resilience are the leadership behaviors that instantiate DCT's microfoundations at the practitioner level, while SDT explains why these behaviors sustain intrinsic motivation and commitment during BPO transitions.

The outcomes underscored the value of strategic leadership during the process of BPO implementation. Executive business leaders must thoroughly select and onboard vendors to minimize the risks faced by their organizations. Leaders should also forge closer ties with vendors and ensure that vendor performance is continuously monitored. While assessing performance, it is crucial to measure both qualitative and quantitative metrics during BPO implementation to gather a more comprehensive understanding of performance outcomes.

Another important aspect of BPO implementation is setting clear and realistic goals with internal employees and external vendors, and ensuring that there is adequate technical and operational support for smoother process integration. Leaders can cultivate and apply a diverse set of leadership skills, including strategic communication, emotional intelligence, decision-making, cross-functional collaboration, and cultural intelligence, to navigate the complex environment of BPO implementation. Lastly, it is essential that executive business leaders develop and apply core leadership abilities, such as vision setting, resilience, empathy, communication clarity, and decision-making to guide their organizations through the complexities of implementing new BPO initiatives.

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Appendix A: Interview Protocol

Interview Schedule

Introduction

Hello, thank you for showing interest in participating in this interview. I am Zienisha Bailey-Grant. I am a Doctor of Business Administration student at Walden University. I am conducting a project to ascertain the risk management strategies used when working with BPO initiatives to enhance organizational success. The findings of this project will assist organizations in leading successful BPO initiatives. Based on your job position and your experience with BPO initiatives, I believe your thoughts, ideas, and views are important to this topic, so I would like to interview you as part of my project sample.

Procedure:

1. Recruitment- I will send targeted email invitations to executive leaders in the identified organization seeking permission to recruit participants and to conduct this project in their organization.
2. Participant selection- Participants who are eligible will be selected.
3. Review and signing informed consent- Informed consent forms will be sent for review within seven days and signed before participating in the interviews or focus group discussion. The informed consent forms will be sent to the participants electronically, reviewed, signed, and sent to me electronically.
4. Scheduling of interviews- I will schedule the virtual interviews after receiving the signed informed consent forms. The interviews will take 45-60 minutes.

5. Conducting interviews- The data for the project will be collected through online interviews through Zoom, which will only be audio-recorded.

6. Member checking- After the completion of both semistructured interviews, transcripts of all the interviews will be generated. Member-checking will be conducted to ensure the validity of the data collected, and you will be given 3 days to review and send feedback to me.

Interview Format

This interview will be based on a conversational design. I will ask questions to gather information relevant to this project's research questions. Feel free to add any thoughts or ideas relevant to BPO initiatives. This interview will be recorded through the online meeting platform Zoom to create a video/audio recording that I will transcribe after the interview. Please do not share the information we discuss with anyone after the interview. You have the right to skip any questions you do not wish to answer. Do you have any questions before we get started?

Demographic questions

- What is your gender?
- Where do you reside?
- Where is the organization you are working for located?
- How many years of experience do you have as an executive business leader?

Targeted Interview Question)

1. What strategies do you use to ensure risks are limited when engaging third-party service providers?
2. What strategies have you found work the best?
3. What managerial and leadership skills are important in BPO initiative implementation?
4. How do you measure the success of these strategies?
5. What challenges have you experienced while implementing these strategies?
6. How do you believe these strategies could be improved?
7. What managerial and leadership skills are essential in BPO imitative implementation?

Conclusion

Thank you for taking the time to share your experiences and insights with me today. Your participation is invaluable to this research.

Appendix B: Qualitative Data Matrix Outline

Interview questions about experiences

Qualitative Data Matrix for Interview Responses to Interview Questions			
Interviewee	Response	Open Codes	Emerging Themes
Question 1:			
Respondent #1	Verbatim response	3–4-word codes per respondent	2–3 word overarching themes of all responses to this question

Appendix C: Codebook

Name	Files	References
Core skills of leadership and management that matter most during BPO initiative establishment	10	44
Adaptability and problem solving	1	1
Adaptability; good planning; calm and decisive	1	2
Adaptive and strategic decision-making	1	1
Adaptive decision-making	2	2
Adaptive thinking and risk-based decision making	1	1
Change management	1	1
Cross-functional collaboration	3	3
Cultural intelligence	3	3
Decision-making agility	1	1
Decision-making skills maintaining flexibility	1	1
Emotional intelligence and patience	7	7
Empathetic communication	1	1
Empathy	1	1
Establishing productive relationships between different functional teams	1	1
Good communication with clarity	1	1
Project governance and cross functional leadership	1	1
Relationship building	1	1
Stakeholder alignment	1	1
Stakeholder communication and influence	1	1
Strategic clarity	1	1
Strategic communication	6	7
Strong negotiation and vendor management skills	1	1
Systems-thinking mindset, a cultural perspective, not people perspective	1	1
Working together with multiple department leaders to fulfill tasks	1	3
Adaptability and awareness in each situation	1	1
Indicators determining achievement of strategy	10	35
A blend of quantitative, qualitative and strategic impact metrics	1	2
Assessing practical results together with organizational-wide influence	1	1
Collecting feedback from employees	1	1

Name	Files	References
Engagement health assessment to evaluate vendor proactivity	1	1
Evaluating strategic contribution	1	1
Evaluation of how BPO relationships deliver strategic benefits to organization	1	2
Implementation of key performance indicators (KPIs)	1	2
Internal stakeholder feedback	1	2
long-term operational effects to evaluate success	1	1
Measuring numeric data and verbal opinions	1	3
Measuring qualitative indicators like stakeholder satisfaction, employee engagement, and cultural fit	1	1
Measuring quantitative indicators like KPIs, strategic alignment	1	1
Measuring quantitative and qualitative metrics	1	3
Measuring quantitative performance metrics in the early stages; SLA	1	1
Measuring quantitative, qualitative input, risk impact, and strategic value metrics	1	2
Measuring risk reduction and operational scalability	1	1
Measuring risk reduction and resource allocation	1	1
Measuring SLA, cost savings, turnaround times, quality or accuracy rates	1	1
Measuring strategic alignment and value created	1	1
Risk reduction outcomes	1	1
Service legal agreements (SLA) to measure operational performance	1	2
Service-level agreement (SLA) adherence	3	4
Major obstacles during the implementation phase of organizational strategies	10	73
Beginning phase of outsourcing	1	1
Communication and time zone challenges	1	2
Real-time dashboards and transparency	1	1
Data integration	1	1
Setting up an anonymous internal BPO feedback channel	1	1
Employees resisting to change their ways	1	2
Better development of transition management procedure	1	1
Expanding operations swiftly	1	1
Failing to match vendor expectations	1	2
Collaboration and staff involvement during vendor selection	1	1

Name	Files	References
Inconsistency in staffing	1	1
Internal resistance	4	8
Change management process	1	1
Improve internal communication	1	1
Internal cleaning before bringing in vendors	1	1
Involving internal stakeholders more intentionally earlier in the process	1	1
Internal team refusal to embrace modifications	1	1
Losing key individuals on the vendor team	1	2
Establishing plans for maintaining business operations when key personnel leave	1	1
Maintaining a sense of partnership over time	1	1
Maintaining user engagement post go live	1	1
Managing expectations	1	2
Standardized onboarding checklist, templates for success metrics, vendor evaluation scorecards, etc	1	1
Misalignment of expectations	2	3
Having a fairly mature outsourcing model	1	1
Mismatched partnership objectives and delivery methods	1	4
Deep onboarding to create better alignment	1	2
Over customization	1	2
Improving alignment internally	1	1
Ownership ambiguity	1	1
Recurring personnel changes	1	1
Resistance within internal teams, insufficient preparedness within vendor organizations, trouble integrating systems and services and conflicting expectations	1	5
Actively enhance governance, onboarding practices, and communication	1	1
Automated systems and real-time data analytics implementation	1	1
Switch resistance from our employees	1	2
Respecting employees and involving stakeholders	1	1
System integration	2	5
Formal learning loop reviewing system; onboarding documentation	1	1

Name	Files	References
Leadership development programs	1	1
Managers for outsourcing teams require specific emotional intelligence training	1	1
Technical integration problems	1	1
Build stronger feedback loop	1	1
More efficient use of real-time data and analytics tools	1	1
Technology compatibility	1	1
Time zone differences with coordination issues	2	2
Unclear ownership during transition periods	1	1
Underestimating time needed to transfer knowledge	1	1
Vendor accountability	3	4
Enhancing post-implementation review and accountability	1	1
Feedback loop with vendors	1	1
Vendor onboarding structure	1	1
Vendor misalignment	1	2
Multiple coaching sessions to develop new templates	1	1
Vendors can act inconsistently	2	5
Improving onboarding vendors process	1	1
More deliberate stakeholder engagement	1	1
Real time visibility into performance	1	1
Tracking vendor innovation and continuous improvement	1	1
Vendors maintain different expectations about their projects despite completed contracts	1	1
Demonstrate examples with output samples to employees	1	1
Workforce resistance, poor communication and employee departures	1	7
Depth engagement with internal stakeholders	1	1
Enhancement to vendor recognition strategies and incentive systems	1	1
Handling training programs together with employee onboarding including customer service in vendor evaluation	1	1
Management of time zones and communication schedules	1	1
Shared dashboard solution for internal members and vendor personnel to communicate	1	1
Most essential leadership capabilities	10	37
Ability to adapt	2	2

Name	Files	References
Active listening and cultural sensitivity	1	1
Building trust	1	1
Change management communication	1	1
Communication clarity	1	1
Cross functional influence	1	1
Cultural empathy and flexibility	1	1
Deciding under uncertain conditions	1	1
Decision-making under ambiguity	1	1
Delegation	1	1
Developing emotional intelligence	1	1
Emotional intelligence	2	2
Empathy	1	1
Facilitation across a variety of functions	1	1
Guide professionally	1	1
Humility	1	1
Long-term vision	1	1
Resilience and adaptability	1	1
Resilience and maintaining composure while dealing with urgent situations	1	1
Resilience under pressure	1	1
Restoring alignment between related parties	1	1
Servant leadership	1	1
Solving problems with resilience	1	1
Stakeholder empathy	1	1
Strategic communication	1	2
Strategic communication and adaptability	1	1
Strategic foresight	1	1
Strategic thinking	1	1
Strategic visioning	1	1
Structured delegation and accountability	1	1
Systems thinking	1	1
Trust building	1	1
Vision setting and expectation management	1	1
Vision-setting	1	1

Name	Files	References
Ways of establishing methods to minimize risks when extending service relationships with external providers	10	83
Analytic tools providing real time feedback on key performance indicators	1	1
Assignment of internal sponsors to each BPO team	1	1
Avoiding interdependence on solitary point of connectivity	1	1
Best; alignment, transparency, and shared accountability	1	1
Best; co-designing operational model with the provider	1	1
Best; codevelopment of the process framework	1	1
Best; early alignment on business goals	1	1
Best; impeccable documentation, great metrics, understanding company culture	1	1
Best; joint goal-setting workshop before BPO project commencements	1	2
Best; maintaining alignment, clarity, and accountability	1	1
Best; proactive relationship management and continuous monitoring	1	1
Best; relationship development	1	1
Best; relationship with vendors	1	2
Best; structured onboarding with embedded governance	1	2
Building in flex time and buffer periods during implementation	1	1
Building shared scorecard that both teams	1	1
Collaborative efforts and maintaining corrective adjustments	1	1
Comprehensive risk assessment of entire value chain before shortlisting vendors	1	1
Conducting pre-engagement risk assessments of our vendors	1	1
Conducting thorough assessments of vendors before and after selection	1	1
Continuous assessment with regular communication activities	1	1
Continuous cultural alignment work and integration initiatives	1	1
Continuous performance management and relationship governance	1	1
Contract structuring and onboarding	1	1
Creating a structured transition plan with the vendor	1	1
Creating systems built on trust to prevent problems	1	1
Cultivating relationships with our vendors	1	1
Cultural awareness and organizational familiarity	1	1
Cultural immersion during onboarding	1	1

Name	Files	References
Deep dive assessment of the potential vendor	1	1
Designing transition plans and aligning operations	1	1
Developing customized contracts for possible real-life business risks	1	1
Developing SLAs and KPIs to establish operations requirements and risk control points	1	1
Developing thorough and easy-to-understand contracts	1	1
Dual-track onboarding process; workflow clarification	1	1
Effective; cross functional onboarding involvement	1	1
Effective; designating a dedicated internal process owner	1	1
Establishing internal function steward	1	1
Establishing shared values while building relationship dynamics with vendors	1	1
Extraordinary care during both outsourcing business operations	1	2
Flexible contract structure	1	3
Complete engagement from internal stakeholders	1	1
Flexibility leads to its sustainability foundation	1	1
Governance structure combined with continuous team engagement	1	2
Gradual handover with tiered implementation	1	1
Identifying problems to ensure good handover process; outsourcing services	1	1
Including exit strategy and audit rights	1	1
Integration mapping	1	2
Internal assessment during vendor selection	1	1
Internal team empowerment	1	1
Maintaining ongoing performance and regular feedback evaluations	1	1
Multi-dimensional vetting	1	1
Multi-tiered governance	1	1
Ongoing performance calibration	1	1
Operational oversight	1	1
Outsourcing customer escalation support through a BPO platform	1	1
Parallel processing, early-stage development	1	1
Proactive monitoring; monthly surveys	1	1
Progressive onboarding; engagement with relevant stakeholders	1	1
Pushing responsibility toward different levels of process complexity	1	1

Name	Files	References
Real-time surveillance techniques with automated feedback mechanisms	1	1
Relationship-building	1	2
Scenario planning after the contract is finalized	1	1
Scenario-based testing functions for pre-go-live assessments to reduce risks	1	1
Scenario-based tests before handover	1	2
Strategic onboarding	1	1
Systematic vendor evaluation based on risk analysis	1	3
Choosing long-term reliability over short-term cost-saving measures	1	2
Thorough vendor vetting, contract safeguards, structured vendor onboarding, and continuous oversight	1	3
Vendor evaluation with contractual oversight	1	1
vendor selection, contractual controls, integration readiness, operational oversight, and cultural alignment	1	2