


2017

# Team Member Selection Strategies

Robert Carl Stewart  
*Walden University*

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# Walden University

College of Management and Technology

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Robert Stewart

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## Review Committee

Dr. Dorothy Hanson, Committee Chairperson, Doctor of Business Administration Faculty

Dr. Anne Davis, Committee Member, Doctor of Business Administration Faculty

Dr. Charlotte Carlstrom, University Reviewer, Doctor of Business Administration  
Faculty

Chief Academic Officer  
Eric Riedel, Ph.D.

Walden University  
2017

Abstract

Team Member Selection Strategies

by

Robert C. Stewart

MS, Walden University, 2011

BS, Hawaii Pacific University, 1995

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

August 2017

## Abstract

Business teams have been losing millions of dollars every year in cost and schedule overruns from incomplete or failed projects. The purpose of this single case study was to explore the strategies that business managers use to determine team fit when selecting employees for assignment to cross-functional project teams. The participants for this study were 3 senior management personnel and a 6-member employee focus group, all from mid-sized, nonprofit organizations located within 200 miles of the tri-state region of Delaware, Maryland, and Virginia. The conceptual framework for this study was Werbel and Gilliland's theory of person-group fit, McCrae's and John's 5-factor model of personality, and Tuckman's theory of personality and group behaviors. Data collection was a triangulation of data from 3 sources: 3 semistructured interviews, a 6-member focus group, and a review of organizational documents. A manual thematic data analysis following the basic principles of Yin's 5-step data analysis process was first used to analyze the data, followed by a second analysis using a qualitative data analysis application. Three primary themes emerged from the data: the use of personality traits, the use of skills or job experience, and the importance of diversity were all evident as factors relating to team member selection strategies. A 4<sup>th</sup> emergent theme was leadership. The leadership theme was important in creating a positive team environment during the team implementation stage. One of the primary implications of social change could be a reduction in social biases and prejudices. As business managers and other employees learn to accept diversity among team members, they may carry these new social attitudes further into their personal lives.

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## Section 1: Foundation of the Study

Business managers are increasingly using teams to accomplish tasks. The complexity associated with technological work environment necessitates the use of teams over the individual worker. Because teams historically have a high failure rate, researchers should explore additional ways of improving team performance and success rates. The focus of this study was on exploring the strategies used by business managers to select employees for team fit and assignment to cross-functional project teams.

### **Background of the Problem**

Organizational leaders are concerned about the effectiveness and performance of their business teams. Based upon varying definitions of project failure, researchers have reported project failure rates near 70% for over 30 years (Dwivedi et al., 2015; Stoica & Brouse, 2013; Teklemariam & Mnkandla, 2017). Researchers have also documented many reasons for project failures, including (a) poor communications, (b) sloppy execution, (c) inaccurate costs estimations, and (d) a lack of senior managements' support (Jørgensen, 2014; Lehtinen, Mäntylä, Vanhanen, Itkonen, & Lassenius, 2014).

When management decides to use a team for a project or a task, there is typically a team formation process. During team formation, managers select and assign individuals to the team. Researchers have documented the importance of ensuring individuals fit the job, the team, and the organization (De Cooman, Vantilborgh, Bal, & Lub, 2016; Kristof-Brown, Seong, Degeest, Park, & Hong, 2014). When management fails to assign the proper individuals to their team, it has a direct impact on the performance and success of

the team (Aubé & Rousseau, 2014; de Jong, Curşeu, & Leenders, 2014). In this study, I focused on this problem.

### **Problem Statement**

Business projects have averaged a 70% failure rate for over 30 years (Dwivedi et al., 2015; Stoica & Brouse, 2013; Teklemariam & Mnkandla, 2017). Approximately 50% of the failures are the result of various project management and team member issues (Burnes, 2014; Jørgensen, 2014; Lehtinen et al., 2014). The general business problem was that cross-functional project teams have difficulty achieving their full potential and effectiveness. The specific business problem was that some business managers lack the strategies for determining team fit when selecting employees for assignment to cross-functional project teams.

### **Purpose Statement**

The purpose of this qualitative, single case study was to explore the strategies that business managers used to determine team fit when selecting employees for assignment to cross-functional project teams. The sample population for the study consisted of three business managers and a focus group of six employees from a single business organization. The organization had to be at least 10-years-old; recognized by external professional organizations for superior performance in at least two of the following attributes or areas: leadership, diversity, change, quality, and/or project management; and had to operate within 200 miles of the tri-state region of Delaware, Maryland, and Virginia. When managers select the best individuals for their teams, both team cohesion and performance may be improved, resulting in increased profitability. The more

profitable businesses are, the more likely they are to take on positive socioeconomic ventures within their local environments, thereby creating positive social change (Calabrese, Costa, Menichini, Rosati, & Sanfelice, 2013; Qiu, Shaukat, & Tharyan, 2016; Wahba & Elsayed, 2015).

### **Nature of the Study**

There are three research methodologies: quantitative, qualitative, and mixed methods (Moustakas, 1994). Frels and Onwuegbuzie (2013) and Leedy and Ormrod (2013) recommended using the quantitative method when looking for statistical, objective information to test hypotheses or theories. In a mixed-methods inquiry, the researcher applies both quantitative and qualitative methods of research within the same study (Caruth, 2013). Yin (2014), however, posited that the qualitative inquiry allows the researcher to explore a lived phenomenon. Yin proposed that researchers use qualitative methods when there is no predetermined answer or theory to test. Morse and McEvoy (2014) demonstrated the effectiveness of using qualitative case study methods and designs with their study on sports ticket pricing strategies. Morse and McEvoy posited that pricing strategies influenced by human psychological and sociological factors warranted a deeper understanding of the process than achievable via a quantitative study. Based upon the above information, I determined the most appropriate choice for the study was the qualitative method.

The five basic designs a researcher may use to conduct a qualitative inquiry are (a) the case study, (b) ethnographic, (c) grounded theory, (d) narrative, and (e) the phenomenological designs (Moustakas, 1994). Ethnography is a design of inquiry used to

study a cultural group (Wägar, 2012). Because the intent of this study was not related to a specific cultural group, the ethnography design was not a valid option. The narrative design is primarily used to study the lives of the participants and then to tell their story through reflection (Hayes, Bonner, & Douglas, 2013). The narrative design did not meet the intent of the study. Phenomenology is the exploration of a phenomenon where the researcher attempts to understand the lived experiences of the participants (Moustakas, 1994). A phenomenological design was feasible but deemed too broad in scope for the study. Based on a review of different qualitative designs, I decided to use the qualitative single case study design for the study.

According to Yin (2013), a qualitative case study is a means for a researcher to explore a phenomenon through real-world context. The purpose of this research study was to explore team selection strategies as modeled by an organization deemed a leader in project management practices. A single case study is the recommended design for studying a unique or model case (Yin, 2014). For this study, I believed the exploratory single case study with a focus group would provide the most detailed data relating to the research question.

### **Research Question**

Denzin and Lincoln (2011) posited that the research question is the one central question designed to guide the study's research. Similarly, Merriam (2014) posed that the research design must correspond to the research question. The central research question for this study was the following: What strategies do business managers use to determine team fit when selecting employees for assignment to cross-functional project teams?

### **Manager's Interview Questions**

To gain a detailed, contextual description of the phenomenon each manager experienced, the primary interview question for this study was the following: As the manager of a business team, explain your role in the process used to identify and select team members for assignment to your business teams. The following supplemental questions supported the primary interview question as a means of exploring the research question.

1. What strategies did you use for forming the cross-functional team?
2. What types of characteristics did you identify as desirable team fit characteristics for the team?
3. What process did you use to assess these characteristics in individuals you considered for selection to the team?
4. What personality characteristics as a unit did the team display?
5. What types of diversity factors did you consider during the selection process?
6. What types of assessment tools did you use during the selection process?
7. What factor(s) contributed most to the cohesion of the team?
8. What resource proved most useful during team selection and implementation?
9. What was the overall performance level of the team?
10. To summarize, what was your overall impression of what made the team successful?



### **Focus Group Questions**

The following questions supported the research question by allowing me to gain a detailed, contextual description of the focus group's experiences as team members. These questions also linked back to the semistructured interview questions the managers were asked, thereby providing additional insight into the effectiveness of the strategies managers used during their team member selection process.

1. What was your reaction to being assigned to a cross-functional project team?
2. How did your personality fit in with the team's overall personality?
3. How did you add value to the team?
4. How would you classify the functionality of the cross-functional team?
5. During your assignment to the cross-functional team, what was your biggest frustration?
6. What additional information would you like to share about your cross-functional team experience?

### **Conceptual Framework**

To plan successful strategies for creating teams, managers must understand the concept of team fit and how to select employees for the desired fit characteristics that will increase team cohesion and efficiency, thereby positively influencing team performance. Researchers have identified numerous factors as performance moderators in both individuals and teams. Three conceptual theories directly related to team fit, cohesiveness, and performance provided the foundation for this study. The three theories

were (a) Werbel and Gilliland's 1999 theory of person-group fit, (b) the five-factor model (FFM) of personality (McCrae & John, 1992), and (c) Tuckman's 1964 theory of personality and group behaviors. Together, the three theories provided a foundation for understanding the importance of team fit and the characteristics that managers need to understand to use team fit effectively as a selection strategy.

Working within a team typically requires a certain amount of interaction between team members. Perceived team member group fit is an antecedent to team-level performance (Seong & Choi, 2014). Werbel and Gilliland's (1999) theory of person-group fit served as a model for understanding the importance of matching employee characteristics between assigned team members. Understanding person-group fit characteristics requires a group-level analysis to identify the relevant criterion that will positively influence variables relating to group cohesion, decision making, cooperation, and productivity (Seong & Choi, 2014). The theory of person-group fit provided a foundation for the next two concepts.

A second conceptual theory deemed relevant to this study was the FFM of personality (McCrae & John, 1992). The FFM was the result of not one researcher's efforts but was the compilation of multiple studies by multiple researchers. According to John, Angleitner, and Ostendorf (1988), various researchers such as Allport and Odbert; Tupes and Christal; and Cattell, Norman, Digman, Wiggins, Costa, and McCrae all contributed to the development of the FFM. The thrust of their individual research efforts was to develop a taxonomy for personality traits. The FFM is not just a list of five individual traits; it is a framework, a categorization of numerous personality traits into

five distinct dimensions (McCrae & John, 1992). The five dimensions are (a) extraversion, (b) agreeableness, (c) conscientiousness, (d) neuroticism, and (e) openness to experience.

The third theory that grounded this study was Tuckman's (1964) theory of personality and group behaviors. Tuckman posited that a group of individuals with known personality structures will result in a group having predictable responses or behaviors. The predictable responses may include indications of cohesiveness and performance levels. Tuckman's theory provided a direct connection between personality traits and the ability to predict a team's performance

### **Operational Definitions**

*Deep-level diversity:* Deep-level diversity includes the underlying psychological characteristics that an individual communicates through verbal and nonverbal behavior patterns, which they learn only through extended interaction and information gathering. Deep-level diversity attributes are subject to construal and are more mutable than other aspects, including values, attitudes, and personality (Tekleab & Quigley, 2014).

*Person-group fit:* The (interpersonal) match between a new employee and the team of coworkers and supervisor(s) s/he will be assigned to work with. In the case of the formation of a new team (formed from an existing group of employees), the same concept may be applied to the match between all members assigned to the new group/team (Werbel & Gilliland, 1999).

*Surface-level diversity:* Surface-level diversity is overt demographic characteristics, which are almost immediately observable and measurable in simple and

valid ways, and social consensus can usually be assumed for each of the demographic attributes (Tekleab & Quigley, 2014). Such attributes include age, gender, race/ethnicity, and tenure (Tekleab & Quigley, 2014).

### **Assumptions, Limitations, and Delimitations**

#### **Assumptions**

According to Kirkwood and Price (2013), assumptions are factors that a researcher believes to be true but cannot be verified. There were three basic assumptions associated with this qualitative single case study. They were (a) participants will answer the interview questions truthfully, (b) participants were willing to share their personal experiences related to the phenomenon, and (c) participants were knowledgeable about the organization's policies and guidelines concerning the implementation of cross-functional teams

#### **Limitations**

Limitations are factors that a researcher cannot control that may limit the scope and quality of a study (Moustakas, 1994). The main limitation to this study could have been organizational-specific requirements or policies that limit or restrict the manner in which cross-functional teams were implemented. Company-specific requirements could have impacted or limited a business manager's strategies for team implementation.

#### **Delimitations**

A researcher uses self-imposed conditions or delimitations to control the scope of the study, or as Welch (2014) explained, the delimitations define what the study does not cover. The first delimitation was that the study included participants from a single

business organization located within 200 miles of the tri-state area of Delaware, Maryland, and Virginia. Given the small population, I established three delimitations as participant eligibility requirements. The following delimitations helped to ensure the collection of rich, detailed data. Participating managers must have managed one or more cross-functional teams. Participating managers must have participated in the team selection process, and focus group participants must have experience acting in some capacity as a member of a cross-functional business or project team.

### **Significance of the Study**

#### **Contribution to Business Practice**

Numerous researchers have focused on understanding how personality traits may influence both individual and team performance (Creasy & Anantatmula, 2013; Seong & Choi, 2014). There is an abundance of documentation in both the academic and business environments on the use of personality assessments and other tests as an aid in the hiring process (Seong & Choi). However, little data or documentation exists on the use of these same data by business leaders towards the selection of their business team members.

The intent of this study was to explore personnel selection strategies that business managers use to select employees for team fit and assignment to cross-functional project teams. By exploring team selection strategies, I wanted to identify best practices currently in use by business managers. The findings of the study may offer business leaders new information and insight that may positively influence the performance of their business teams. As a result, businesses may be able to realize savings in both time and money, thus increasing their profitability and competitive advantage.

### **Implications for Social Change**

The implications for social change were twofold. The findings from this study could have a positive impact on employee job satisfaction. Higher job satisfaction has been linked with lowering employee turnover rates and improved work-life balances (Kumar & Charkraborty, 2013; Lightfoot, 2014). When a company is profitable, its influence on the local environment is likely to be positive (Calabrese et al., 2013; Qiu, Shaikat, & Tharyan, 2016; Wahba & Elsayed, 2015). Positive social change may come from a variety of factors, such as new jobs within the local community, increased business tax revenue, and improved corporate social responsibility initiatives.

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

A literature review is a compilation of literature from the knowledge base on a given topic. Completing this literature review involved researching this knowledge base for information published by other scholars and researchers. A literature review serves many purposes (Callahan, 2014). A literature review is a method by which a researcher can highlight the relationship of the current study to the existing body of knowledge (Callahan, 2014).

The purpose of this qualitative, single case study was to explore the strategies that business managers were using to determine team fit when selecting employees for assignment to cross-functional project teams. By exploring selection strategies used by management, I was able to develop an understanding of how managers developed their strategies for measuring or evaluating employees for person-team fit. To understand the significance of this issue, scholars should explore the history of business teams (Dwivedi

et al., 2015; Jørgensen, 2014; Lehtinen et al., 2014; Teklemariam & Mnkandla, 2017).

This negative history of business teams provided the reason for the research study's primary research question: What personnel selection strategies do business managers use to select employees for team fit and assignment to cross-functional project teams?

Through the literature review, the reader can gain insight into the various strategies that business managers used to make personnel selection decisions. Through the literature review, the reader is introduced to many of the key moderators found to influence both the individual and team efficiency and performance. A manager's ability to predict the performance of his/her team should increase the chances for a successful team project.

The information for this literature review came from both professional and academic literature and provided a foundation for the reader to understand the importance of how managers select individuals for business teams. This literature review provided insight into three key areas: a brief review of the on-going problems associated with business teams, an examination of the factors determined to influence and predict both individual and team performance, and a look at the strategies recommended by researchers as a means for the implementation of business teams.

Prior researchers have identified numerous factors that influence the performance of both the individual and team. The conceptual framework foundation for this study came from three related theories that encompass the concepts of team fit, cohesiveness, and performance. The three theories were (a) Werbel and Gilliland's 1999 theory of person-group fit, (b) the FFM of personality (McCrae & John, 1992), and (c) Tuckman's 1964 theory of personality and group behaviors. The three theories provided a foundation

for understanding the importance of team fit and the characteristics that managers need to understand to use team fit effectively as a selection strategy. Comprehension of the concepts discussed herein provided the key to understanding person-team fit and many of the factors documented as moderators between individuals and teams. The moderators discussed were broken out into the following areas: (a) person-group fit, (b) FFM of personality, (c) personality and group behavior, (d) psychological testing and assessments, (e) cohesion, (f) social networks, (g), diversity, (h) workgroups and teams, and (i) selection strategies.

Developing an audience's understanding of the research topic is a crucial part of every study. I used a 3-step process for locating applicable resources. The process provided a transparent and systematic method for locating and synthesizing current literature. First, I developed a list of applicable journals that related to the themes and theories identified in the conceptual framework. Second, I used keyword searches to compile a list of possible articles. For this study, the primary keywords searched were *personality*, *selection strategies*, *team fit*, and *performance modulators*. Within each journal, numerous variations of these keywords were used to locate articles relevant to the study. Third, I based article selection on a review of the abstracts and the quality and quantity of the keywords located within each article. I located additional resources by searching for articles published by particular authors known for conducting research related to the above topic areas.

The currency of the resources (less than 5-years-old) and reliability (being peer-reviewed) helps to develop the trustworthiness of a study (Levy & Ellis, 2006). In this



literature review, 109 of the 120 resources I cited were peer-reviewed, which equated to a peer-reviewed percentage of 91%. To ensure currency of my resources, 102 of my 120 resources were less than 5-years-old, which equated to a percentage of 85%. The articles came primarily from two types of sources: databases or journal archives. My intent was to search various journal archives such as *Human Factors*, *Journal of Applied Psychology*, *Journal of Business and Psychology*, *Journal of Personality and Social Psychology*, *Organizational Psychology*, and *Small Group Research*. A partial list of databases I used included (a) Business Source Complete/Premier, (b) Emerald Management Journals, (c) PsycINFO, (d) Psychology: A SAGE Full-Text Collection, and (e) SAGE Premier.

### **Person-Group Fit**

Based on research data and business trends, the use of business teams will continue to grow and expand (Aubé & Rousseau, 2014; Burch & Anderson, 2004). As this growth occurs, so does the need for managers to develop their understanding of selection methods for implementing their teams (Aubé & Rousseau, 2014; Kristof-Brown, Seong, Degeest, Park, & Hong, 2014). The process a manager uses for selecting personnel for assignment to a team is more than matching skills or knowledge to the position. Managers should make team members selections based on their potential fit in each of three categories.

The three categories of fit are fit for the job, fit with the leader, and fit with others (Kristof-Brown et al., 2014). Managers must have an understanding of the skills and knowledge factors relevant to the position. The manager must also understand his/her

own personality preferences, the personality of the team, and the personality of the organization (Kristof-Brown et al., 2014). However, developing this understanding is where managers typically start having problems. Business managers do not understand how to identify which characteristics are necessary to ensure proper team fit (Aubé & Rousseau, 2014; de Jong et al., 2014) while maximizing team cohesion and performance. Although managers have a variety of techniques for determining individual job fit, there are only a handful of tools available for evaluating the person to team fit (Burch & Anderson, 2004). As Seong and Choi (2014) documented, one such tool is the manager's attitude and working climate he or she establishes. A manager's ability to form and maintain a positive climate for the group positively influences the group-level fit factors, which influence group performance (Seong & Choi, 2014). Additional research in this area appears necessary to provide managers with additional tools and knowledge necessary for completing the various fit evaluations.

Historically, when a manager assigned an individual to a team, the assignment was permanent, from start to finish, unless something warranted the member's removal (Tannenbaum, Mathieu, Salas, & Cohen, 2012). As a team advances through the various stages of a project, however, business managers are substituting in different members. Each new member brings in skills and knowledge that are more specialized and better equipped to meet the challenges of the upcoming project phase or tasks (Tannenbaum et al., 2012). More managers are using core teams (Tannenbaum et al., 2012). Management will typically surround their core teams with a ring of specialists (Tannenbaum et al., 2012). Management will swap different specialists in and out at key points during the

lifecycle of the project. The personnel exchanges are supposed to optimize the team's strengths for that designated phase of the project (Tannenbaum et al., 2012). The use of core team members and the swapping of members is one of a variety of issues that have raised concerns among researchers as to how new teams operate (Tannenbaum et al., 2012).

There are various pros and cons associated with this type of team management. Researchers have related the advantages associated with using core teams to the positive aspects of maintaining project/task continuity (Tannenbaum et al., 2012). The disadvantages of changing team members are concerns about negative influences on team cohesion, person-team fit, and diversity (Tannenbaum et al., 2012). Seong et al. (2015) split the area of fit with others into two distinct parts, referred to as the person to environment fit and person to group fit. Seong et al. reported a positive relationship between the person to group fit and group outcomes. Managers could use their understanding of this relationship to create positive influences to group performance by selecting candidates who would maximize person to group or person to team fit.

Burch and Anderson (2004) cited a concern however, about the person to group fit. Burch and Anderson posited that when a manager incorrectly matches a person to a team, the manager's action might create conflicting characteristics resulting in a dysfunctional team. Conflicting characteristics may negatively influence team cohesion and performance through personality clashes, biases, or other factors, thus creating the significance for why business managers need to understand the relationship between personality traits and team performance.

## **Five Factor Model of Personality**

During the 20th century, Cattell (1945) and Norman (1963) attempted to define personality. According to Kandler, Zimmermann, and McAdams (2014), personalities include various characteristics relating to emotion, cognition, motivation, and behavior. As Norman (1963) pointed out, there were over 1,000 different personality descriptors. Cattell (1945) noted this lack of a single, well-defined taxonomy as one of the main reasons it was difficult for researchers to correlate data between studies. Eventually, Cattell sorted through the different scales and libraries of traits, reducing the total number down to 50 clusters of common or similar grouping, and from there, down to 12 personality dimensions. However, as John et al. (1988) reported, numerous researchers had difficulty attempting to replicate Cattell's results.

Although researchers were unsuccessful at validating Cattell's (1945) findings, they were successful at identifying a new taxonomy for personality. Tupes and Christal (1961) identified five recurring factors or themes that repeated across eight different samples. In 1963, Norman reported similar findings (to Tupes and Christal), identifying four of the same five traits dimensions they had documented. As other researchers reported similar findings regarding the five dimensions, this new taxonomy of traits became known as the FFM or big five (John et al., 1988). The five trait dimensions are extraversion, agreeableness, conscientiousness, neuroticism, and openness to experience.

Each dimension has multiple characteristics associated with it (John et al., 1988). Extraversion deals with aspects related to sociability, outgoing, and self-confidence. Conscientiousness implies work orientation, conformity, control, and prudence.

Neuroticism refers to emotional stability and control. Although openness and agreeableness sound like they could be the same, they are not. Agreeableness deals with social adaptability, forgiving, trusting, and being compassionate. Openness experience deals with being curious, imaginative, and having an inquiring intellect.

Additional research on the big five and other personality issues continued to grow through the 1980s (John et al., 1988). A recent search on Google Chrome Scholar for the term five-factor model of personality returned over 2.23 million hits. A more defined search on the phrase the FFM of personality and job performance returned over 680,000 hits. The above statistics demonstrate the popularity and interest for both the FFM and the relationship between personality and job performance.

An individual's personality has been associated with his or her work performance (Barrick & Mount, 1991; Kristof-Brown et al., 2014; Woods, Lievens, De Fruyt, & Willie, 2013). Different traits within the big five can modulate or influence individual performance factors and social interactions (Gardner & Quigley, 2014). Personality assessments based upon the FFM are becoming familiar tools used in employment screening, employee training programs, or as team building events (Berry, Kim, Wang, Thompson, & Mobley, 2013; Hogan & Foster, 2013).

An individual's personality is evident through a variety of factors: likes, dislikes, talk, dress, or through what he or she enjoys doing or not doing. Personalities not only influence the individual, but also how individuals interact together (Minbashian, Earl, & Bright, 2013; Salgado, Moscoso, & Berges, 2013; Steele-Johnson & Leas, 2013). The better a business manager understands how personality influences the behavior of an

individual, the more the manager may be able to leverage the use of personalities during the team selection process. A business manager may improve the results of his or her selection process by increasing his or her understanding of how an individual's personality influences performance.

Gardner and Quigley (2014) documented the positive correlations between personality characteristics and performance. Personality traits correlated as performance moderators include openness to experience (Minbashian et al., 2013), conscientiousness (Salgado et al., 2013), and agreeableness (Steele-Johnson & Leas, 2013). Various researchers (Gardner & Quigley, 2014; Loiacono, 2014; Moeller, Harvey, & Maley, 2015) studied the relationship between individual team member behaviors and the moderating role that behaviors play in influencing group characteristics. Scholars have documented direct correlations between individual and team behaviors, thereby making it possible to apply many personality traits typically associated with individuals to teams.

The presence of personality characteristics, such as agreeableness, extraversion, and emotional stability act as positive influencers to team or social interactions (Loiacono, 2014; Moeller et al., 2015). To further validate the influence of personalities on performance, Schmidt and Hunter (1998) performed follow-on studies in which they scrutinized the validity and reliability of earlier research, thereby increasing the validity of the previous studies' findings. Barrick and Mount (1991) examined the relationship between the FFM and job performance across 117 studies yielding them 162 samples. Barrick and Mount added validity to both their study and the reliability of the FFM. The

FFM is one of the most reliable personality assessment tools available (Cooper, Knotts, McCord, & Johnson, 2013).

Researchers tested the FFM extensively (Gurven, von Rueden, Massenkoff, Kaplan, & Lero Vie, 2013; Judge, Rodell, Klinger, Simon, & Crawford, 2013). Business managers who understand the FFM may find the results of this assessment useful during the team selection process. Besides the FFM, there are several other personality tests used by business managers such as (a) The Myers-Briggs Type Indicator (MBTI; Montequín, Fernández, Balsera, & Nieto, 2013), (b) The Minnesota Multiphasic Personality Inventory (MMPI-2; Lough & Von Treuer, 2013; Tarescavage, Corey, Gupton, & Ben-Porath, 2015), and (c) the Revised Neuroticism-Extraversion-Openness (NEO) Personality Inventory (McCrae, 2013).

Many business organizations are using the above personality assessments to gain insight into the personalities of individuals (Payne, 2014; Pecena et al., 2013; Salgado & Tauriz, 2014). Managers may be using this information for professional development, making hiring decisions, or other personnel selection activities. There are numerous other tools not discussed here, developed for particular organizations, for specific purposes (Niebuhr et al., 2013). Business managers may find value using personality assessment results in their team fit selection process (Ellershaw, Fullarton, Rodwell, & McWilliams, 2016; Schmitt, 2014).

While various researchers such as Payne (2014,) Pecena et al (2013), Salgado and Tauriz (2014) have all documented findings that support the use of personality traits in the selection and hiring process, there are other researchers such as Aubé and Rousseau,

(2014) who caution that there are no straightforward predictive relationships between personality and performance. For a manager attempting to gain insight into the best team member selection processes has multiple factors to consider, knowing how personality influences performance is simply one element. There are other situational moderators, which can affect performance. Situational moderators include factors such as role assignment and task complexity (Aubé & Rousseau, 2014). Aubé, and Rousseau (2014) confirmed that team member personality could influence how a team functions, thus impacting their effectiveness. Aubé, and Rousseau also determined that behavioral factors are stronger indicators of team performance than are results-oriented criteria. I stopped reviewing here due to time constraints. Please go through the rest of your section and look for the patterns I pointed out to you. I will now look at Section 2.

An individual's behavior concerning their resistance to change is another trait that managers should monitor. Burnes (2014) posed that resistance to change is human nature and that a linkage with an individual's personality may exist. Since many of the projects teams work on could result in changes to a process or the organization, this would appear to be another specific factor managers should monitor. As Burnes posited, resistance to change may play a large factor in why so many projects fail, negatively influencing an organization's competitiveness. Mdletye, Coetzee, and Ukpere (2014) discussed a number of factors concerning why an individual may resist change. Factors such as a feeling of loss of control, a fear of failure, and the fear of uncertainty were reasons for employees to resist change. Both uncertainty and the stress associated with that uncertainty are other



factors that can create problems with employees and organizational change efforts (de Jong, et al., 2014; Mdletye et al., 2014).

There appears to be divergent data regarding the importance of individual characteristics and personality traits and their influence performance. Considering the historically low success rates for teams (Jørgensen, 2014; Lehtinen et al., 2014), any manager, who is looking to create a business team, would probably benefit from this information. The more concise a manager's understanding is of how traits influence team performance, the greater probability that manager will implement selection strategies that use trait moderators

### **Personality and Group Behaviors**

Due to the increased use of teams, there was a definite need to understand how the personality characteristics of an individual could affect the performance of a work team. Numerous researchers such as Tupes and Christal (1961), and Norman (1963) were all studying various aspects of how personality influenced behaviors and performance. Tuckman's (1964) study of personality and group behaviors provided additional insight as to how personality traits could be used to predict a group's behavior. Tuckman's findings provided evidence, which supported the belief that by knowing the personality structures of individual team members, a manager could with some degree of certainty; predict the team's performance. Tuckman's study focused primarily on homogeneous groups, thus his citing and acknowledging the need for additional research in this area using heterogeneous groups.

Researchers have documented a variety of factors that may influence a team's behavior and performance. Bradley, Baur, Banford, and Postlethwaite (2013) discussed how some factors might display immediate indications while others require time to develop into noticeable group results or relationships. The significant factor here is to understand the difference between behavior-based processes and effective or cognitive-based (emergent) states (Bradley et al., 2013). Common behavior-based processes include communication, conflict, and cooperation, whereas emergent states include affective tone, cohesion, and efficacy (Bradley et al., 2013). Coultas, Driskell, Burke, and Salas (2014) also stressed the importance of understanding emergent states and their role in team behavior and performance. In their 2015 study, Waller, Okhuysen, and Saghafian discussed how emergent states are not always present, and that managers can achieve these emergent states only through specific changes within the team.

Bradley et al. (2013) documented the ability to identify the effectiveness of the team communication process before seeing any indications that an emergent state of team cohesion was forming. One example of this behavior-based process would be to understand how the trait agreeableness influences team member interactions. Bradley et al. found that face-to-face teams with high levels of agreeableness had better communication and sharing of ideas than virtual teams high in agreeableness. Team members in face-to-face situations not only received the oral message transferred during the communication but also were able to read the body language of the individual transmitting the message (Bradley et al., 2013), whereas virtual teams lose the benefit of reading the sender's body language. A manager's increased understanding of behavior-

based processes may enable them to predict long-term emergent states such as team efficiency and performance (Coultas et al., 2014; Waller, Okhuysen, & Saghafian, 2015).

Researchers have explored the relationship between personality and behavior extensively. Researchers such as De Cooman, Vantilborgh, Bal, and Lub (2016) and Kristof-Brown et al. (2014) contributed studies focused on the relationship between personality traits and behavior. The study of groups and how personalities influenced the team's performance may have been more significant than the study of individual personalities. A Google Chrome Scholar search similar to the search performed above (for the Five Factor Model), searching for the phrase Personality and Group Behavior returned 2.78 million hits. The use of a few variations on the search phrase demonstrates that there is a wealth of information available on this topic, representing a diverse field of research and literature.

Researchers have studied a variety of topics exploring the relations between team behavior, performance, and personality. Gonzalez-Mulé, DeGeest, McCormick, Seong, and Brown (2014) found that teams of individuals with varying levels of extraversion were more likely to become collaborative, supportive workgroups than groups with similar levels of extraversion. Kong, Konczak, and Bottom (2015) discovered evidence to support their hypothesis that low levels of agreeableness helped to reduce groupthink and was positively correlated with team performance. De Jong, Bijlsma-Frankema, and Cardinal, (2014), Gonzalez-Mule et al. (2014), and Jacobson, Jacobson, and Hood, (2015), all found that when they compared personality traits to values, traits were good predictors of initial responses, but values proved to be more effective at predicting

longer-term actions. These three groups of researchers help to demonstrate the diversity of the research that exists on the relationships between individuals, teams, personality, and performance.

### **Psychological Testing and Assessments**

Psychological testing is beneficial to leaders when determining the potential of applicants for inclusion into the organization. Jung (1971) helped to shape the science of personality profiling. Jung's study of introversion and extraversion, coupled with a belief in the process of individuation helped establish a method for individual classification based upon discrete psychological functions. Myers and Briggs were inspired by Jung to further develop and refine the field of personality testing and assessments (Ayoubi & Ustwani, 2014; Montequín et al., 2013).

One of the first uses of psychological testing for selection purposes was by the U.S. military. In 1917 the U.S. Army started using psychological testing to select and place soldiers into jobs (Christie & Montiel, 2013). Since that time, psychological testing has grown, expanding into multiple fields (Scroggins, Thomas, & Morris, 2008).

Psychological testing branches out into many different areas. This study and literature review will focus on only two of the many types of tests. The two types are cognitive ability testing and personality assessments. Researchers have found the two items work well as predictors of job performance when used together (Ellershaw, Fullarton, Rodwell, & McWilliams, 2015; King et al. 2013; Panganiban & Matthews, 2014). Researchers have found cognitive ability testing and personality assessments to be valid predictors for both

individual and team performance measurements (Huang, Ryan, Zabel, & Palmer, 2014; King et al., 2013; Wihler, Meurs, Wiesmann, Troll, & Blickle, 2017).

Cognitive ability testing is a means of measuring individual intelligence concerning specific abilities (Schmitt, 2014). Cognitive ability tests have undergone numerous reviews and evaluations, and researchers have repeatedly validated the use of cognitive ability tests as a useful tool for making predictions of performance in both educational and work settings (Schmitt, 2014). Researchers and business managers have used cognitive ability tests for various personnel selection processes, such as air traffic controllers (Pecena et al., 2013), police candidates (Tarescavage, Brewster, Corey, & Ben-Porath, 2014), unmanned drone controllers (Rose, Barron, Carretta, Arnold, & Howse, 2014), military pilots (King, 2014), and throughout other industries such as sales and service, protection professionals, and vehicle operators (Schmitt, 2014).

Researchers found that business managers were less likely to use or accept the results of personality tests as compared to cognitive tests. Unlike cognitive ability testing, scientists and researchers were slow in reaching agreement on a reliable taxonomy and definition for personality (Scroggins et al., 2008). Because of this lack of a clear definition, business managers were hesitant in accepting research findings (Scroggins et al., 2008). Academics and business managers developed negative mindsets toward personality studies, often questioning the validity of the study (Barrick & Mount, 1991). An additional concern for personality testing was the ease by which individuals could fake different personalities during the assessment by manipulating their responses (Sjöberg, 2015).

## **Cohesion**

When researchers are exploring team outcomes, they often study cohesion and satisfaction. Cohesion, as defined by Mello and Delise (2015), is that force or energy that unites, bonds, or holds a team together, that makes them a viable unit. To help understand what cohesion is and how it works, look at the following metaphor, which compares cohesion to the compound mortar. A mason uses mortar to hold bricks together on a wall. When a mason mixes and applies the mortar correctly, it hardens as it dries bonding the bricks firmly together as a solid wall. When the mason has mixed the mortar incorrectly, it does not dry or bond properly, resulting in a wall that falls apart. When a manager properly selects a group of individuals and mixes them together as a team, they should develop a strong bond (force or energy) between them (Mello & Delise, 2015). The bond holds them together as a solid (cohesive) team. When a manager uses the wrong mix of individuals, and no bond, or energy develops between the team members, the result is a weak team that may easily fall apart, similar to a weak wall.

Researchers have pursued the study of cohesion in order to understand how it influences team outcomes. DeOrtentiis, Summers, Ammeter, Douglas, and Ferris (2013) found the stronger the level of cohesion was between team members; the more likely the members would be to accomplish their assigned goals or objectives. This statement may not be as clear-cut as it sounds. According to Castaño, Watts, and Tekleab (2013), cohesion may come in either one of two types: task cohesion and social cohesion. Task cohesion is that energy that drives a team toward the accomplishment of their goal. Interpersonal or social cohesion is the force that influences an attraction to the group,

such as friendships or other personal relationships (Castaño, Watts, & Tekleab, 2013). Thus, the previous statement by DeOrtentiis et al. is valid when one is considering task-oriented cohesion. Should the discussion be about interpersonal cohesion, there very well might be a strong bond or attraction toward the group, but it may not have any bearing on the completion of the team's task.

Documented throughout the literature are factors that act as moderators for cohesion. The moderators include trust, personality traits, diversity, and social connectedness. DeOrtentiis et al. (2013) documented the relationship between cohesion, trust, and team effectiveness. DeOrtentiis et al. concluded that as the trust between team members increased, the team's (task) cohesion became stronger, which in turn increased the team's drive toward completing their assigned task. Aeron and Pathak (2016) examined the influence of personality traits, specifically the FFM, to determine the relationship of personality traits to both social and task cohesions. Just as in previous studies, Aeron and Pathak found positive correlations between extraversion, agreeableness, and emotional stability with social cohesion. Aeron and Pathak also found positive correlations between conscientiousness, agreeableness, and emotional stability towards task cohesion, which provides a definitive link between personality traits and team performance.

Researchers Aeron and Pathak (2016) have clearly illustrated the connection between cohesion and teams via several personality traits that act as moderators. Business managers, who understand how moderators work, could use this information as a tool in their strategy for forming cohesive business teams. Business managers could identify and

select the individuals most likely to form cohesive teams by simply testing candidates for specific moderating traits.

Numerous studies populate the field of existing literature on the importance of social networks to team cohesion (Sloan, Newhouse, & Thompson, 2013). However, Wise (2014) speculated that a team can have too much cohesion and that there is a point of diminishing returns. In his 2014 study, Wise reported new evidence supporting the theory that too much cohesion can create problems such as groupthink, decrease innovation, or even create distractions with team members spending too much time building internal ties. Few deny the significance of the relationship between cohesion and performance. However, business managers need to be vigilant for negative side effects that cohesion may develop.

### **Social Networks**

When managers decide to form a team, there are many factors to consider. Ruolian et al. (2015) documented the relationship of an employee's personality and their position within a work-related social network with both their job performance and career success. Bolander, Saturnino, Hughes, and Ferris (2015) posed that managers going through a hiring or selection process should consider candidates with different personality types which encourage social relationships. These traits might include openness to new experiences and extraversion.

The more central an individual's relationship is within a social network; the more positive are that person's influence and performance within that social network (Carboni & Ehrlich, 2013). Based upon the reported relationships between social networks and



personality, with respect to job performance, managers forming teams should consider using selection strategies that take advantage of these factors. Some of the moderators that influence social networking include cohesion, diversity, and personality traits (Sloan et al., 2013). Given the moderating effects of social networks, managers need to recognize the importance of developing task cohesion on the team's social cohesion and performance (Bertolotti, Mattarelli, Vignoli, & Macrì, 2015; Sloan et al., 2013).

Maslow (1954) identified five levels in the hierarchy of needs. According to Maslow, an individual could progress to the next higher level only after the individual fulfilled the needs of their current level. Maslow identified the five levels as (1) physiological, (2) safety and security, (3) belonging (social), (4) self-esteem, and (5) self-actualization (as defined regarding individual development).

The lowest level, physiological, consisted of items that Maslow (1954) identified as necessary for survival – items required to maintain personal health and preservation. Once the Physiological needs, and the Safety and Security needs are met, individuals will concentrate on their Social needs – the need for belonging and acceptance. According to Maslow, an individual had to fulfill the need for Social belonging before the individual could transgress to the higher levels of self-esteem and finally Self-actualization. The logic follows that should an individual fail to achieve the satisfaction of the social belonging stage, he/she will never be able to reach the level of their full potential through Self-actualization.

Following Maslow's lead, Creasy and Anantamula (2013) presented their hierarchy of social and behavioral development with the same underlying principle –

humans naturally seek some form of social connectedness. According to their theory, the lowest level, or most fundamental needs of social and behavioral development is the individual's concern for self-identify. Creasy and Anantatmula noted that when a person is most concerned about self-identity is when team cohesion is at its lowest state. As the social interaction between the team members increases, the team will progress through the various stages of team development. According to Creasy and Anantatmula, as the progression evolves, the individuals become increasingly concerned about the team and team processes. As the concern for the team increases, team cohesion increases simultaneously. The feelings of belonging will rise as team cohesion increases. Ultimately, the individual's need for belonging is satisfied, and he/she will progress to the next higher level of Maslow's hierarchy of needs moving closer to achieving their full potential through self-actualization.

### **Diversity**

Although diversity may influence an individual's ability to reach self-actualization via their social ties, it has also been found to moderate both individual and team performance in other ways. According to Sloan, Newhouse, and Thompson (2013), race diversity and other factors might play a significant role in both the number of social relationships and the derived support the relationships may provide. Wang, Chiang, Tsai, Lin, and Cheng (2013) provided evidence demonstrating how gender influences team performances. Mohammed and Harrison (2013) posited that when it comes to diversity, even simple differences such as how individuals view time, might influence (either positively or negatively) the relationships and performance between diverse individuals.

Diversity has come to mean more than just differences in gender, race, and cultures. Diversity is no longer just a measure of black and white (Attiah, 2014). As Casper, Wayne, and Manegold, (2013); and Tekleab and Quigley, (2014) discussed there are surface-level and deep-level diversity factors. Surface-level diversity consists of specific demographic characteristics, which are almost immediately observable and measurable in simple and valid ways. Deep-level diversity includes the underlying psychological characteristics, which an individual communicates through verbal and non-verbal behavior patterns learned only through extended interaction and information gathering.

Each type of diversity has its own unique set of concerns and moderators. For example, Tenzer, Pudelko, and Harzing (2013) found that language diversity can create biases or other type problems when other demographic diversities do not. Language barriers can impede proper communications, creating miss-understanding, and other issues. Tenzer et al. reported that diversity of our natural tongues (primary language) can go beyond the surface-level range negatively influencing our deep-level diversity factors such as competences, integrity, and benevolences. In another study, Pieterse, Van Knippenberg, and Van Dierendonck (2013) were able to shown how team goal orientations could moderate the cultural diversity-performance factor.

Hendricks and Cope (2013) discussed the need to understand age or generational diversity and how a person's generation influences not just their behavior and performance, but their social values and interactions. Given the changing definition of diversity, and its influence on individual and team performance, managers could benefit

by developing their knowledge and skills of diversity as a means of improving the performance of their business teams. A manager's knowledge of how different employees react to working with older or younger team members could prove beneficial when creating teams.

### **Work Groups and Teams**

Teams come in various sizes, perform multiple functions, and may be physical or virtual. The configuration of a team depends on the organization's needs and the task they will undertake. One definition for a team is a group of two or more employees whose interaction and work efforts go toward accomplishing a shared organizational goal or purpose (Taplin, Foster, & Shortell, 2013). Although there are other definitions, three common factors include: (a) teams consist of two or more individuals, (b) team members work together, and (c) their combined efforts relate to accomplishing a common goal or objective (Binsiddiq & Alzahmi, 2013; Taplin et al., 2013). For many managers, the combination of the above three factors forms the basis for one of their primary responsibilities getting individuals to work effectively as a unit toward a common goal.

In many instances, managers must constantly look for new team members. Team members may come and go for a variety of reasons. As Mathieu, Tannenbaum, Donsbach, and Alliger (2014) discussed this influx of team members can have both positive and negative influences on the team's performance. On the positive side, Mathieu et al. pointed out that these dynamics may help to keep the team flexible, create new social bonds, or bring new energy and creativity. Whereas on the negative side, there is always the possibility the new member could become a disrupter, creating conflict, or

harming social connections. Whatever the case may be, managers should be consistent in their leadership style, and use the same original tools and strategies used when implementing the team.

A review of team literature highlights three key facts concerning teams: (a) there are strategic or competitive advantages to using teams, (b) the use of teams is on the rise, and (c) the success rate for teams is less than desired. DeCostanza, DiRosa, Rogers, Slaughter, and Estrada (2012) conducted a study examining ways to improve the performance of complex teams in the military. During the study DeCostanza et al. expressed concerns that the majority of existing research on teams came from studies on traditional teams of three or four individuals working in mostly stable, non-complex environments. DeCostanza et al. believe this to be the gap between research and the business practice. According to DeCostanza et al. a good starting point would be to develop updated descriptions or structures for defining complex teams working in complex work environments. Once new team descriptions are in place, researchers will need to explore the differences between the traditional teams and the new complex teams. DeCostanza et al. are not alone in recognizing the need for updated research; other researchers (Tannenbaum, Mathieu, Salas, & Cohen, 2012) have voiced similar concerns.

In 2012, Tannenbaum et al. expressed concerns as to how the business environment that teams operated in had changed significantly, becoming more complex than the previous 2-3 decades. Teams were operating in more fluid and dynamic business settings (Tannenbaum et al., 2012). In many instances, individuals are being assigned to multiple teams. This can have both negative and positive impacts to the teams (Bertolotti,

Mattarelli, Vignoli, & Macri, 2015; Pluut, Flestea, & Curşeu, 2014). For teams to be successful in that business environment, team members needed to be more flexible, diverse, and resilient to change (Tannenbaum et al., 2012). Spencer (2013) noted that changes are occurring faster than individuals can become subject matter experts. The complexities of projects are increasingly exceeding the knowledge levels and time limits available from a single individual or even a small team (Spencer, 2013). Both managers and teams require new tools to meet the updated demands of their jobs.

Many of the tools/factors managers rely on are antiquated and based upon research collected during the old business environment; an environment that existed before the huge high-tech explosion and world globalization (Spencer, 2013). As early as 1998, Schmidt and Hunter recognized the need for new research to re-validate the findings of previous studies concerning the use of teams, and team performance moderators. According to Spencer (2013), the new tools must use information based on the technology coming from the updated business environment. Some of the various tools or factors that managers have available to use and need to have updated include (a) personality characteristics, (b) intelligence, (c) team cohesion, (d) team diversity, (e) gender in teams, and (f) social connectedness.

DeCostanza et al. (2012), Schmidt and Hunter (1998), Spencer (2013), and Tannenbaum et al. (2012), have identified the necessity for new, updated research. The over-riding opinion among researchers appears to be that the traditional business team has changed. A new, complex business team is in operation and new research is

necessary to support this team (DeCostanza et al., 2012; Schmidt and Hunter, 1998; Spencer, 2013).

Researchers have documented team failure rates between 60-70% for the past two decades (Jørgensen, 2014; Stoica & Brouse, 2013). Business professionals such as Jørgensen, (2014) and Lehtinen et al. (2014) discussed factors that negatively influenced the success rate of business teams and projects. Such factors include inexperienced or untrained personnel, poor communications, inadequate planning, and poor leadership (Jørgensen, 2014; Lehtinen et al., 2014). Tannenbaum et al. (2012) grouped the causes for dysfunctional team performance into one of five general areas (a) task characteristics, (b) work structure, (c) individual characteristics, (d) team characteristics, and (e) team processes. The majority of the causes identified by Tannenbaum et al. linked directly to an individual or the team. Although some researchers voiced concerns about the benefit of teams, the majority of the literature reviewed documents positive expectations regarding the use and benefits of teams. Berg and Karlsen (2014) reported that managers could influence teams through positive leadership, active coaching, core strengths identification, and other methods all centered on an attitude of positivity.

Tuckman's (1964) study on the relationship between a group's composition and their performance was just one of many research studies attempting to identify ways to improve team performance. In 1996, Anderson and West developed the Team Climate Inventory (TCI). The TCI is a team level survey used to identify a team's climate or profile across four specific ratings (Anderson & West, 1996). TCI ratings are (a) participative safety, (b) support for innovation, (c) team vision and (d) task orientation.

The TCI was developed primarily as a tool for understanding a team's profile and how the team was functioning as a unit (Anderson & West, 1996). By evaluating a team's combined profile via the TCI, a manager may gain insight to areas where specific individuals are sensing conflicts with the other team members. Anderson and West proposed that by finding these areas of conflict or miss-alignment, a manager could take corrective action to reduce or eliminate the problems.

Studies by Beaulieu et al. (2014) and Ceschi, Dorofeeva, and Sartori (2014) have both shown the effectiveness of using the TCI as a means for evaluating problems or possible conflicts within a team, and thereby providing the necessary training to improve team communication and performance. Through their meta-analysis, Acuña, Gómez, Hannay, Juristo, and Pfahl (2015), were able to provide further confirmation of Anderson and West's (1969) findings regarding the importance of and value of a Team's climate indicator. Acuña et al. were able to demonstrate the effectiveness of using both personality and team climate in relation to IT software development projects. Acuña et al. found evidence that through proper understanding and use of personalities and team climate, factors such as team cohesion and satisfaction were positively influenced.

In 2004, Burch and Anderson used their knowledge of the TCI to develop, test, and propose the use of the Team Selection Inventory (TSI). The TSI is an individual level survey that provides an indication of the individual's preferred team working style. Burch and Anderson developed the TSI for use in conjunction with the TCI. According to Burch and Anderson, by comparing an individual's TSI against the team's TCI, a manager can rate an individual's likelihood to be a proper fit for the team. The TSI could be a tool



managers might use as part of their team selection strategy. It should be noted however, that the use of the TCI either alone or in conjunction with the TSI as noted above by Beaulieu et al. (2014); and Ceschi, Dorofeeva, and Sartori (2014), have both proved to be valid strategies for improving team performance.

### **Selection Strategies**

In 2010 alone there were 940, 000 new jobs created in the United States (Shipps & Howard, 2013), each requiring a personnel selection decision. The list of selection procedures or tools available to business managers is quite long. The list includes such practices as (a) interest tests, (b) conscientiousness tests, (c) personality assessment centers, (d) integrity tests, (e) general mental ability (GMA) tests (f) personal interviews, (g) reference checks, (h) educational background, (i) age considerations, (j) job experience, (k) personal references, and (l) custom assessments (Mortensen, 2014; Ryan & Ployhart, 2014; Schmidt & Hunter, 1998).

Many of the items listed above are commonly used tools for employment decision-making, whereas others have been specifically used in evaluating employees for team assignments (King et al., 2013; Schmidt & Hunter, 1998). Researchers have studied these decision tools thoroughly, documenting the reliability and validity values for each (Schmidt & Hunter, 1998). As projects become more complex and new types of teams are formed, researchers have stressed the importance of using better tools for the selection process (Cerinus & Shannon, 2014; Hinami, Whelan, Miller, Wolosin, & Wetterneck, 2013; Mitchell, Strube, Vaux, West, & Auditire, 2013). When a manager considers which tools to use, some consideration may be given to which tools the

candidates prefer or dislike. As noted by McCarthy, Van Iddekinge, Lievens, Kung, Sinar, and Campion, (2013), candidates may become nervous or even distrust the use of certain selection tools or methods. A selection process as just described should provide a manager the ability to fully understand an individual's fit characteristics for possible selection to the job, organization, and/or team.

Besides problems relating to identifying an individual's fit, managers have other concerns to guard against during the selection process. Patterson, Knight, Dowell, Nicholson, Cousans, and Cleland, (2016) discussed various selection bias resulting such as personality similarity factors, where a manager too closely identifies with the candidate. Kristof-Brown, Seong, Degeest, Park, and Hong, (2014) also warned managers about falling victim to their personal biases. Kristof-Brown et al. advised managers to be cautious about letting their desires bias their evaluation of the candidates, thus forgetting the needs of the team and organization. Rubini and Menegatti (2014) reported findings where linguistics biased the selection process for various women within their career field of academia. As discussed, managers face numerous problems during the selection process. Managers may avoid these problems by developing a full understanding of the team's characteristics and personalities, and following a planned approach (strategy) to guide them through the selection process (Burch & Anderson, 2004).

When researchers examine the success (failure) rate of business teams, they often wonder what went wrong. With over a century of research and more than a dozen tools (as listed above), managers should have highly effective strategies in place for making team member selection decisions. Researchers such as Datta, Yong, and Braghin (2014),

Perry, Karney, and Spencer (2013), and Wei, Lai, Wei, and Peng (2013) have all posed through different studies, the significance of using proper strategies for identifying and selecting team members. Lapoint and Haggard (2013) specifically addressed the importance of project team selection for effective project management. According to Schmidt and Hunter (1998), the choice by an organization to continue using selection methods having low validity values is a mistake that can negatively influence their business operations. This practice creates a competitive disadvantage through personnel selection errors, which could lower productivity (Ryan & Ployhart, 2014; Schmidt & Hunter, 1998). The impact on an organization could result in a less efficient workforce, which may have a negative impact on the business operations and profitability.

### **The Need for Change**

Doing business is not the same as it was 50 years ago (Tannenbaum et al., 2012). There have been significant changes (Tannenbaum et al., 2012). The increase in the use of teams and outsourcing has become common (Langer, 2016). Business globalization and the resulting diversification of the workforce are other factors influencing how companies are changing (Sultana, Rashid, Mohiuddin, & Mazumder, 2013). Many of the traditional business practices and processes are no longer effective in this new environment (Khanagha, Volberda, Sidhu, & Oshri, 2013). For example, Daspit, Justice Tillman, Boyd, and Mckee (2013) specifically researched the increased use and popularity of the cross-functional team. In their research, Daspit et al. documented not only the positive aspects of cross-functional teams, but also a lack of other research on cross-functional teams and what factors contribute to their success.

According to researchers, as the business environment changes, the roles and responsibilities of existing jobs are changing (Tannenbaum et al., 2012), in particular, the roles and compositions of business teams. Organizations to realize they are no longer in the industrial age where workers were just laborers following orders. In the current age of technology, Alliger, Cerasoli, Tannenbaum, and Vessey, (2015) stressed that teams need to be more resilient, due to the complexity of tasks, high volume jobs, and limited resources. As job scopes change, so do the skills and knowledge requirements associated with the jobs (Alliger, Cerasoli, Tannenbaum, & Vessey, 2015). Based on the literature, business managers have a valid need and reason for understanding the techniques and resources available to them for properly identifying the skills and competencies that individuals require to be effective, cohesive team members.

There appear to be few researchers who studied team selection strategies used by business managers. There are numerous tools and models presented throughout the literature, with recommendations on their use and information detailing their validity values. The literature also contains numerous reports and studies in which the researcher examined team failures or performance problems, but few if any that document specific strategies business managers used to select their teams and how their teams did or did not meet expectations. This apparent gap in the literature could help explain why team performance continues to suffer as reported. Similar to the doctor who treats a patient's symptoms, the patient will continue to suffer until they cure the illness, vice simply treating the symptoms.

### **Transition**

In Section 1 of this study, I introduced a general business problem relating to the non-cohesiveness of business teams and a team's inability to reach full potential. The specific problem I identified was a lack of information regarding successful strategies that managers use for identifying and selecting the best individuals for assignment to their cross-functional teams. The purpose of this single case study was to explore the strategies business managers were using in the formulation of business teams. I increased my understanding of the strategies business managers were using through semistructured interviews. Section 1 laid the foundation for understanding the problem, the purpose of the study and a detailed synthesis of the literature. In Section 2, I have provided additional details about the methodology and data analysis that I chose to employ in the study. Section 3 contains a detailed report outlining the findings of the study.

## Section 2: The Project

Organizations use teams as the primary means of accomplishing projects of various types and complexity (Jørgensen, 2014). This includes items such as new product development, business expansions, and implementing organizational change. The majority of business projects fail to meet expectations (Jørgensen, 2014). The purpose of this qualitative, exploratory single case study was to explore the strategies that business managers are using for selecting team members.

### **Purpose Statement**

The purpose of this qualitative, exploratory single case study was to explore the personnel selection strategies used by managers when selecting employees for team fit and assignment to cross-functional project teams. The sample population for the study consisted of three business managers and six employees from a single business organization. The organization was located within 200 miles of the Delmarva tri-state region of Delaware, Maryland, and Virginia. The organization chosen for the case study has received awards and recognition from different organizations in leadership and management, marketing, and other areas resulting from successful projects. The implications for positive social change includes (a) increased projects team results; (b) increased profitability; (c) increased employee job satisfaction; and (d) increased social economic conditions for the employees, the organization, and the local community.

### **Role of the Researcher**

For this qualitative study, my role as the researcher was to facilitate the research process. In this study, I was the primary data collection instrument. In qualitative studies,

the primary data collection instrument is often the researcher (Lincoln & Guba, 1985; Peredaryenko & Krauss, 2013). Yin (2014) posed the idea of the researcher acting as a content mediator in a qualitative study. As a part of this exploratory, single case study, I conducted semistructured interviews becoming the content mediator as I worked to capture the experiences of the participants.

Jacob and Furgerson (2012) recommended that researchers use a standard interview guide or protocol to help ensure consistency of the interview process. The interview protocol I developed for the study (See Appendix A) provides a standardized sequence to follow ensuring consistency across all interviews. The interview questions are, therefore, a main piece of the interview protocol (De Ceunynck, Kusumastuti, Hannes, Janssens, & Wets, 2013; Yin, 2014). This type of consistency helps to improve the reliability of the data (Jacob & Furgerson, 2012). The researcher is responsible for analyzing the participants' lived experiences to identify common themes. From the themes, I gained insight that helped me to develop answers to the research question.

Through my former employment positions, I was able to reflect back over 30 years' work experience at all levels of the organization. Although work experience is beneficial in many situations, Loh (2013) cautioned the researcher to be careful not to allow personal experience to bias their research. My work experience provided me an understanding and appreciation for the value of this research and how managers stand to benefit through improved team performance. Although there were benefits to my having a background and experience in selecting team members, I had to ensure that I did not develop any preconceptions or biases that could have negatively influenced my data

collection and analysis processes. Using bracketing (Chan, Fung, & Chien, 2013), I was able to minimize the influences and biases that I might have created due to my personal and professional experience and training.

According to Chan et al. (2013), the use of bracketing may help to reduce preconceptions (biases) formed through personal experiences but the extent to which bracketing is successful depends on the researcher's commitment toward using the various bracketing methods. As Chan et al. discussed, researchers may bracket their personal experiences and training in a variety of ways. Researchers have used bracketing to help identify possible preconceptions and biases. Other methods that researchers used include keeping theoretical, methodological, and observational notes and memos (Noble & Smith, 2015). To help me identify my preconceptions and biases, I maintained a reflective log and conducted a bracketing interview with my program chair. The bracketing interview was completed before the start of my data collection/interviews. By reviewing the notes from my bracketing interview and reflective log at appropriate times, I was able to improve the overall bracketing process and minimize the impact of any personal biases and preconceptions I may have developed. I continued to record my notes in the reflective log throughout the data collection and analysis phases.

Before attempting to contact anyone, I secured approval from the Walden Institutional Review Board (IRB). IRB approval indicated that I had included within my study the necessary steps for ensuring participant safety and welfare. As Walker, Read, and Priest (2013) posed, the researcher is responsible for ensuring the integrity and trustworthiness of both the research and data. I had to provide the necessary safeguards to



protect both the participants and their data. Following the Belmont Report Protocol (Greaney et al., 2012), I also had the responsibility for ensuring the safety of all human participants, their privacy, and their beneficence. A study based on ethical practices and values not only helps to ensure the safety and welfare of the participants but also influences the reliability and validity of the findings.

All individuals signed consent forms prior to starting data collection (see Appendix B). According to Bristol and Hicks (2014), the researcher can positively influence the outcome of the study by ensuring that participants receive fully informed consent. Bristol and Hicks and Chang and Gray (2013) both posed that participants tended to develop closer trusting relationships with researchers who had correctly informed the participants about the risk associated with a study. In this type of a relationship, participants are more comfortable in talking about and sharing their experiences. Incorporated in the research process are appropriate security measures for maintaining confidentiality of both the participants and their data. Demonstrating a personal commitment to the safety and welfare of the participants aided in developing the participant-researcher relationship based on trust, honesty, and transparency (Chang & Gray, 2013; Lincoln & Guba, 1985).

### **Participants**

According to Yin (2014), researchers should strive to obtain participants who have the most experience related to the problem under study. I used the following eligibility criterion to locate the most experienced participants for use in this study. Business managers had to have (a) managed one or more cross-functional teams and (b)

participated in the team selection process. Focus group participants had to have some type of experience serving as a member of a cross-functional team. The above criteria were established to ensure participants had experienced related to the selection process associated with the implementation of a cross-functional team. The above eligibility criteria helped to ensure that only individuals who had experience in selecting cross-functional team members were permitted to participate, thus improving the reliability of the data and the applicability of the findings to the stated research question.

Study participants came from a single business organization. The organization chosen for this single case study was an established, recognized leader in their industry. The organization met the following criteria: was over 10-years-old; had been recognized by external professional organizations for superior performance, leadership, and diversity; and operated within the 200 miles radius of the tri-state region of Delaware, Maryland, and Virginia.

Initial contact with prospective businesses was via telephone, requesting their cooperation in supporting the research study. A signed letter of cooperation (see Appendix G) with the organization helped to ensure their understanding and willingness to assist with the study. Contact with potential participants was via e-mail confirming their ability to meet the eligibility criteria and their willingness to participate. After initial contact, follow-up discussions were via telephone and e-mail, as the participant preferred.

Establishing and maintaining positive relationships with both the organization and participants throughout the duration of the study is essential (Denzin & Lincoln, 2011; Driskell, Blickensderfer, & Salas, 2013). To develop this relationship, I focused on

creating an atmosphere of trust through honesty and transparency. To build rapport with each participant, I reviewed all of the necessary safeguards that were in place to maintain their safety and confidentiality and how the study findings could benefit them and their organizations. Additionally, before the start of the actual interview, I reviewed the informed consent form (see Appendix B) with each participant one last time. This process allowed me to ensure that each participant fully understood his or her rights and was comfortable participating in the study. My final review of the informed consent form was also a method to increase the comfort level of the participants. The final review was a way for me to further demonstrate my concern for each participant's safety and rights, thereby raising the participant's level of trust in me and increasing his or her willingness to be more open toward discussing his or her experience of the phenomenon in richer detail.

### **Research Method and Design**

For this study, I used a qualitative, exploratory, single case study method and design. The specific business problem was that some business managers lacked strategies for determining team fit when selecting employees for assignment to cross-functional project teams. Thus, the goal of this study was to explore the strategies that business managers used to select team members and the resulting impact, if any, on team performance.

### **Research Method**

There are three primary research methods: quantitative, qualitative, and mixed methods. A researcher studying trends or relationships among variables will usually use a

quantitative method (Denzin & Lincoln, 2011; Leedy & Ormrod, 2013; Marshall & Rossman, 2016; Yilmaz, 2013). The quantitative method allows researchers to test one or more hypotheses through mathematical analysis (Denzin & Lincoln, 2011; Leedy & Ormrod, 2013). Additionally, quantitative researchers apply deductive reasoning to the results of an experiment to express relationships between variables (Kavoura & Bitsani, 2014). In this study, I explored a particular human experience. Based upon the above information concerning quantitative methods, and my intended exploration of the human experience, the quantitative method was not an acceptable method for this study.

In the past, researchers have increased their use of the mixed-methods methodology (Boeije, Slagt, & van Wesel, 2013; Fetters, Curry, & Creswell, 2013; Franz, Worrell, & Vögele, 2013; Spillman, 2014). In a mixed-methods study, researchers use both qualitative and quantitative methods together to present results that neither method alone offers (Harrison, 2013; Venkatesh, Brown, & Bala, 2013). In the mixed-methods study, researchers typically use one method to support the other method. Because the problem I studied had no theories or quantifiable data, a mixed-methods approach was not appropriate for this study.

A researcher who has little or no understanding of the problem may choose the qualitative method (Denzin & Lincoln, 2011; Yilmaz, 2013). Qualitative methods facilitate the collection of rich, detailed data when exploring a unique problem or phenomenon (Denzin & Lincoln, 2011; Houghton, Casey, Shaw, & Murphy, 2012). In a qualitative study, as a participant explains his or her experience, the researcher attempts to understand the participant's experience as a story. Pettigrew (2013) posed that through

qualitative research and analysis of a phenomenon, researchers may gain additional insight or understanding of the theory under study. My quest had been to understand the managers' strategies for selecting project team members; thus, a qualitative method was a perfect fit for my study. By improving managements' understanding of existing evaluation tools, my intent was to help managers improve their selection strategies for implementing teams.

### **Research Design**

Qualitative researchers may choose one of several standard qualitative designs (Merriam, 2014). The designs are (a) narrative, (b) case study, (c) ethnography, (d) grounded theory, and (e) phenomenology (Denzin & Lincoln, 2011; Guetterman, 2015; Wang & Geale, 2015). Each design offers the researcher a different approach to completing the research and collecting data, thereby facilitating the researcher's quest to answer the research questions.

According to Moran (2013), Saltmarsh, (2013), and Tanggaard (2014), the ethnographic design is best suited for a study of a sociocultural nature or interpretation. Because this study concerned a process and not a sociocultural event, I did not feel the ethnographic design was a good choice for the study. A researcher would use a grounded theory design to formulate a new theory linked to the data (Hall, Griffiths, & McKenna, 2013). As this study was not an attempt to develop a new theory, but rather to understand the strategies used by the participants, the grounded theory design was not an appropriate option for the study. Narrative designs, according to Beattie (2014), work well when conducting an analysis of a story or the chronological accounts of one or two individuals.

The purpose of this study was to explore the strategies that the participants chose to use during the team selection process. Thus, the narrative design was not appropriate for this study. Through a phenomenological design, the researcher investigates the lived experiences of the participants of a phenomenon (Moustakas, 1994). Although I could have used a phenomenological design for this study, I felt it was not the best design for exploring a business strategy or process.

According to Kaczynski, Salmons, and Smith (2013), the case study design provides a researcher the opportunity to conduct an in-depth exploration of a single case or a small number of cases. Case study research is both credible and rigorous (Cronin, 2014). Baškarada (2014) and Boblin, Ireland, Kirkpatrick, and Robertson (2013) posed that the case study inquiry works well for developing an understanding of an organizational process, strategy, or the exploration of other work-related issues. Yin (2013) noted the case study design as a valid means of studying a phenomenon to determine what happened and why it happened. Horne and Ivanov (2015) and Mazaroli, Clark, and Reboud (2014) have successfully used the case study design to explore various types of strategies and human resource practices. Based on the previous facts, I used a single, exploratory case study for this study.

Regardless of the sample size, data saturation occurs when no new themes or patterns surface from the data (O'Reilly & Parker, 2012). Methodological triangulation is a method used to increase the trustworthiness and validity of a study's findings (Heale & Forbes, 2013; Walsh, 2013). In this single case study, I used methodological triangulation by collecting data via the following sources: semistructured interviews, focus groups, and

company documents/policies. According to O'Reilly and Parker (2012), data saturation is evident when no new themes emerge during further data analysis. For this study, data saturation was evident when no new themes emerged from the analysis of the third participant interview.

### **Population and Sampling**

Because the purpose of this single case study was to explore the strategies used by the business manager to select employees for a cross-functional business team, the sample size was relatively small coming from just a representative sample of managers within a single company. Given the small sample size, I was able to use methodological triangulation. As noted by Fusch and Ness (2015), analyzing data from multiple sources helps to ensure saturation. The population for the study consisted of three business managers and a focus group consisting of six employees.

The use of purposive sampling was a way to identify individuals with the experience and skill relevant to the research question (Palinkas et al., 2013; Yilmaz, 2013). Bernard (2013), Marshall and Rossman (2016), and Robinson (2014) found the use of purposeful sampling in a qualitative case study completely acceptable. When using purposive sampling to obtain expert participants, smaller sample sizes are sufficient to obtain rich, insightful data (Palinkas et al., 2013; Yilmaz, 2013). Montero-Marin et al. (2013) posed that purposive sampling aided in maximizing the value of each participant's input while obtaining rich, meaningful data.

All participants came from the same company. Identifying the right participants helps a researcher collect quality data (Yilmaz, 2013). The use of participants from a

poorly identified sample will provide less than desired results (Yilmaz, 2013). To avoid this, I used the purposive sampling strategy to ensure that only the managers having experience in selecting and managing cross-functional business teams participated in the study. This approach helped to ensure the selected participants had experienced the phenomenon studied and could adequately respond to the interview question. Although some researchers have questioned the rigor of purposive sampling, Ochieng (2013) have supported its use in obtaining a complete picture of the participants' experiences. I stopped reviewing here due to time constraints. Please go through the rest of your section and look for the patterns I pointed out to you. I will now look at Section 3.

I developed a list of organizations meeting the eligibility requirements by researching publications and websites of professional organizations such as the Project Management Institute (PMI), DiversityInc, and the Center for Creative Leadership for the names of companies which they have recognized for superior performance in the areas of leadership, diversity, quality, or project management. Limiting my search to established organizations meeting this criterion helped to ensure I was only looking at organizations acknowledged as leaders within their industry.

### **Ethical Research**

I have completed the National Institute of Health (NIH) training course Protecting Human Research Participants, and have placed a copy of the certificate of completion in Appendix C. The Walden IRB ensured my study complied with the university's ethical standards and all applicable U.S. federal regulations. All researchers need to demonstrate their comprehension of the ethical standards and legal requirements necessary to protect



the rights and welfare of human participants (HHS, 2012). Successful completion of the NIH training and receipt of the university's IRB approval for my study helps to validate my understanding of the ethical and legal requirements associated with conducting research involving human beings.

Following ethical guidelines throughout the research process is critical (Gibson, Benson, & Brand, 2013). Individuals, who agree to participate in this study, will read and sign an informed consent containing all the required disclosure facts. Each participant received a copy of the consent form to review and sign before performing interviews. I reviewed the consent form with each participant before starting interviews, which helped ensure each participant's understanding of the risks, associated with a study (Holland, Browman, McDonald, & Saginur, 2013). By reviewing the consent form with the participants before starting the interviews, a researcher may help demonstrate the transparency of the study's design (Holland et al., 2013). This transparency might aid in developing a positive researcher-participant relationship based upon trust (Holland et al., 2013). To achieve this same type of transparency and trust in the study, I included steps in the interview protocol (Appendix A) for reviewing the consent form with each participant.

Maintaining all consent forms (see Appendix B) in a locked cabinet has aided in ensuring participants' confidentiality throughout all phases of the study. A lockable security cabinet provides protection for all hard copies of data, computer flash drives, and other physical media. The use of a strong password has helped to protect electronic files. Stripping personal information from documentation and assigning each participant an

alphanumeric identification code helped to ensure participant confidentiality (East, Peters, Halcomb, Raymond, & Salamonson, 2014). Maintaining all data files for this study in a secure safe for 5 years after completion is required. The destruction of this data will occur on the fifth anniversary of completing the study.

In accordance with standard NIH research policy (Greaney et al., 2012; HHS, 2012), a participant may withdraw from the study at any time they desire. For record purposes, withdrawals may be via written or electronic requests. A verbal withdrawal requested during the interview would have immediately ended the interview (HHS, 2012). Participants were required to follow-up all verbal requests with either a written or an electronic request. I would have provided confirmation of a withdrawal request in the same manner received. Participation in this study was voluntary with no incentives offered or promised. There were no requests to withdrawal or end participation by any participants.

### **Data Collection Instruments**

In qualitative studies, the researcher is typically the primary data collection instrument (Leedy & Ormrod, 2013). As the researcher for the proposed study, I was the primary data collection instrument. My responsibility was to conduct the semistructured interviews associated with the data collection process for this study. My plan was to conduct semistructured face-to-face interviews in a neutral location agreed upon between the participant and me. Semistructured interviews offered the ability to collect rich, accurate, meaningful data from the participants (Rowley, 2012). To help build trust and a strong rapport, a researcher should continuously convey to the participant how important

and useful their participation is to the successful completion of the study (Lewis, 2015). Through repeated conveyance of my thanks to the participants for their assistance and support in completing my study, I was able to build rapport with the participants.

According to Drabble, Trocki, Salcedo, Walker, and Korcha (2016), telephone interviews offer data of comparable quality and detail to face-to-face interviews. In addition to telephone interviews, various researchers have reported the use of other modern technologies such as Skype, to be very effective method for conducting interviews while offering many advantages such as cost savings and ease of transcription (Deakin & Wakefield, 2013; Oates, 2015; Sullivan, 2013). My backup plan was to use Skype for conducting interviews should time or distance situations preclude scheduling of face-to-face meetings. Follow-up interviews were scheduled be conducted via the same manner as the initial interviews all things permitting. Telephone interviews were to be used only as a last resort for follow-up interviews.

Before commencing all interviews, participants confirmed their verbal consent to record their interviews. As suggested by Doody and Noonan (2013), interview times will not exceed 60 minutes in duration. All managers were given the same primary interview question and supplemental questions. The primary interview question for this study was: As the manager of a business team, explain your role in and perception of the process used to select team members for team fit and assignment to your business teams. The use of a detailed interview protocol guide (See Appendix A) helped ensure consistency and uniformity of interviews (Doody, 2012).

The purpose of the semistructured interview was to collect as many relevant data about the experience as possible from each participant. Due to the time lapse between the occurrence of the lived experience and an interview, participants may need some probing to help draw out explicit details of the phenomenon (Doody, 2012; Rowley, 2012). Supplemental questions helped to stimulate their memories concerning the events associated with their experience (Rowley, 2012). The supplemental questions came from a standardized list (see Appendix A). Each supplemental question related directly back to the phenomena under study.

Follow-up communications with each participant provided participants the opportunity to perform member checking (Lincoln & Guba, 1985; Loh, 2013). Member checking allowed each participant to review the researcher's translation and interpretation of their interview statements (Lincoln and Guba, 1985; Loh, 2013). Member checking is a recognized procedure used by researchers to enhance the reliability and validity of the qualitative study (Loh, 2013).

One method to enrich data is to combine interviews with a focus group (Doody & Noonan, 2013). The use of a focus group, as a second tool, allowed me to explore team member experiences related to their selection and team assignments. The context of the focus group centered on their experiences relative to their selection and assignment to the cross-functional teams and their team experience. Focus group research may be used as a stand-alone design, or in conjunction with other qualitative methods and designs (Then, Rankin, & Ali, 2014).

As the data collection instrument, I also reviewed company documentation concerning the implementation and use of cross-functional business teams. Boblin, Ireland, Kirkpatrick, and Robertson (2013) noted that reviewing existing documentation is a valid source for locating new data, or themes, as part of their methodological triangulation. The review of company documentation can provide an additional means for validating saturation (Denzin & Lincoln, 2011). Additional data sources such as project team reports, lessons learned, policy documents, etc. that may contain information about the implementation and use of cross-functional business teams served as a means for completing the methodological triangulation.

### **Data Collection Technique**

The use of methodological triangulation helps to facilitate data saturation while improving the reliability and validity of the study (Carter, Bryant-Lukosius, DiCenso, Blythe, & Neville, 2014). For this study, I collected and compared data from multiple sources. According to Cronin (2014), the use of triangulation can decrease or eliminate the typical problems associated with a single strategy, thereby increasing the breath for interpreting the findings. By combining in-depth interviews and direct observations with information gleaned from secondary sources, I was able to gain a complete understanding of the phenomenon. Data sources included the semistructured interviews with functional managers, a focus group, and a review of existing project team reports, and lessons learned.

The first step of data collection for the study was the semistructured interviews of the three business managers. Since the study was a single case study design with

semistructured interviews, a pilot study was not warranted. The semistructured interviews were the primary source of data. I asked open-ended questions to illicit a detailed description of the strategies the participants used for selecting possible team members. To ensure consistency between interviews, I followed a standard interview protocol. As Doody (2013) suggested, use of a standard interview guide or protocol helps ensure consistency of the interview process. Appendix A contains the interview protocol that I followed while interviewing the business managers.

I recorded all interviews to ensure I did not miss any pertinent information. Seidman (2013) noted that recording the interviews during a study helps maintain the validity and accuracy of the data. There are pros and cons associated with recording a study's interviews, such as the ease and accuracy of obtaining verbatim transcripts and concerns about the comfort of the interviewee (Rowley, 2012). After a thorough review of the literature on this subject, I decided to record all interviews for this study. Tessier (2012) noted that when a researcher records an interview in a nonintrusive manner, the participant appears more comfortable and open with the interview. To achieve the same open, relaxed atmosphere Tessier described, I used a Smartpen with a built-in recorder. Actual handwritten note taking during the interview was limited to short bullets relating to nonverbal elements such as body language movements or other factors requiring written documentation for later clarification or analysis (Onwuegbuzie & Byers, 2014).

The second step of data collection was a face-to-face focus group session. The focus group consisted of participants who had experienced the same phenomenon of selection and appointment to a cross-functional business team. Focus groups offer a valid

source for data collection, comparison, and can function as a source for methodological triangulation (Rodriguez, Schwartz, & Lahman, 2011). An indication of data saturation was when data collected from steps one and two showed no new ideas or themes (Hennink, Kaiser, & Marconi, 2017). As with step one, I recorded the focus group session. A separate focus group protocol helped to maintain the focus group's discussion in alignment with the study research and the interview questions from step one (see Appendix E).

The third step of data collection was a review of company specific documents governing the formation and management of cross-functional business teams. The only available documentation was a Project Summary and Lessons-Learned Report for the organization's last major project. This document provided supporting evidence for the data collected from steps one and two, and helped to verify data saturation. The convergence of data from three different sources acted as a means for reducing bias and improving the trustworthiness and reliability of the study (Campbell, 2015).

As Noble and Smith (2015) suggested, the use of a reflective log may help prevent the insertion of any personal bias. Therefore, as I transcribed the audio recordings, I periodically reviewed my reflective log ensuring I was careful not to inject personal feelings or bias into the transcriptions. Once the transcription process was complete, an analysis of each participant's responses was conducted to identify any patterns or themes.

As Marshall and Rossman (2016) recommended, I used a coding system to manage the identification and tracking of common themes. To prevent redundancy while

ensuring a thorough review of the data, I tracked and documented all participant data relating to identification and coding of themes in a Microsoft Excel spreadsheet. Themes that I could be traced back to the conceptual framework were considered acceptable. Member checking followed the initial coding and theme identification analysis.

During member checking, participants reviewed the initial coding and themes identified through the data analysis phase. Member checking provided each participant the opportunity to review and verify or refute the interpretation and accuracy of their interview data (Koelsch, 2013). Numerous studies highlight the benefits associated with member checking with regards to data triangulation and validity (Koelsch, 2013). However, Reilly (2013) reminded the researcher of several concerns with member checking. Reilly cautioned that participants might forget their exact words or comments from the interview or the context of what they had stated. Some participants may be completely unaware of the body language they displayed during the interview. Other participants may not understand the coding and theme analysis and therefore, present an attitude of compliance. The researcher may avoid many of the above issues with detailed note taking during the interview (Reilly, 2013). Since audio recording captured all discussions, actual handwritten note taking during the interview was limited to short bullets. The short bullets documented nonverbal elements such as body language movements or other factors, which later helped with clarification or analysis of data. The combination of notes and audio recording provided a very detailed record of each interview, thus allowing the researcher to avoid many of the before mentioned problems.



Following accepted interviewing and data analysis processes, should raise the credibility and reliability of the study (Reilly, 2013).

### **Data Organization Technique**

As the researcher, part of my responsibility was to establish a system for organizing and managing all the data, reflective journals, labeling and coding systems. The use of a unique participant coding system helps to maintain participant confidentiality and anonymity (Greaney et al., 2012). This coding system linked all data and files back to the appropriate participant while maintaining their anonymity. I used Microsoft Excel to help organize the data via a spreadsheet I was able to search and filter for data manipulation. Per the Belmont Protocol and NIH research policy (Greaney et al., 2012; HHS, 2012), researchers must maintain all data files for a minimum of 5 years in a secure storage location. After the 5-year time requirement, researchers should destroy all data (HHS, 2012). Per this requirement, I will maintain all data files associated with this study in a secure cabinet at my residence until destroyed.

### **Data Analysis**

During the process of conducting a qualitative study, a researcher is likely to collect a large pool of rich data (Lincoln & Guba, 1985; Rowley, 2012). As both Legewie (2013) and Onwuegbuzie et al. (2012) discussed, data analysis and interpretation are both important aspects of the research process, where the true meaning of the data is identified. In qualitative data analysis, the researcher performs a coding process as s/he attempts to identify central ideas or themes within the data (Lightfoot, 2014; Moustakas, 1994). One method for accomplishing this analysis is via thematic analysis (Braun &

Clarke, 2006; Rodham, Gavin, Lewis, St. Denis, & Bandalli, 2013). In this case study, I used thematic data analysis to analyze the data. To accomplish this, I followed Braun and Clarke's (2006) data analysis process.

Following the semistructured interviews and focus group discussion, I transcribed all voice recordings to text. I used the application MacSpeech Scribe by Nuance to help transcribe each voice recording to text. Perrier and Kirkby (2013) recommended the voice to text application MacSpeech Scribe by Nuance as an effective means for transcribing participant interviews from audio recordings to text. I was aware the transcription software makes various mistakes; thus, I performed detailed reviewing and editing to ensure the accuracy of the transcriptions. During the voice to text transcription process, I verified that all participant names and other identifying data had been replaced with random participant codes.

After transcription, the first phase was to familiarize myself with the data, re-reading the data as necessary to fully understand it. This involved not just the transcripts of the semistructured interviews, but also the transcripts of the focus group, any pertinent company documentation identified as being relevant to the study, and all my research notes and reflective journals. Following the interview transcription process, a methodological triangulation, and analysis of the data was performed. Conducting a methodological triangulation at that point helped to consolidate all the data collected from the semistructured interviews, the focus group, relevant company documentation, my reflective notes, and journals. Methodological triangulation helped to identify themes, which aided with the data assessment and interpretation. As Braun and Clarke (2006) and

Legewie (2013) both posed, proper coding and categorization of the data helped to facilitate sorting and arrangement of the information.

Methodological triangulation was a key part of the overall research process. Use of a qualitative data analysis (QDA) application has been shown to provide more consistent and reliable coding of the data. QDA application software enables the user to upload and organize all the data from the semistructured interviews, the focus group, organizational documents and my notes and reflective journal. Running the QDA application with all the research data uploaded at one time performs the methodological triangulation automatically. As the QDA application runs, sorting and searching on key words and phrases, it will identify themes and noteworthy trends, organize data, and display information in multiple formats such as charts, graphs, and maps (Bazeley & Jackson, 2013). A researcher should record their decision to use a QDA in the audit along with the expectations as to what the researcher felt the QDA benefits would be (Woods, Macklin, & Lewis, 2015).

Once I had all the data properly coded and compiled, I used the QDA application NVivo to sort the data based upon key words and phrases. I used keyword searches to look for selection strategies having some linkage or meaning related to individual or team personality traits, characteristics, or behaviors, or other factors about group fit. According to Tummons (2014), the benefits of using a QDA application are faster and more consistent data analysis. Lancaster, Di Milia, and Cameron (2013) recommended use of a QDA application to assist with the data analysis. Once I had completed the sorting and auto-coding using the QDA, I worked on the identification of themes, subthemes, and

categories. Next, I compared against the results of the manual data analysis against the results of the analysis using the QDA. As themes emerged, I applied descriptions to each theme and category. In their study, Braun and Clarke (2006) recommended that all themes be traceable back to the conceptual framework and the research question. To achieve this same type of verification, I checked the alignment and applicability of each against theme against my conceptual framework and research question. I coded and tracked other uncorrelated themes that emerged for possible use later as necessary.

Before the final refinement of the findings, I offered participants the opportunity to member check the accuracy of the findings. Upon completion of this member-checking phase, I conducted a final review and refinement of themes and their descriptions, and then completed the final report of findings. At this point, data analysis was complete.

### **Reliability and Validity**

Traditionally, quantitative researchers have used the context of reliability and validity to demonstrate rigor and thereby build confidence or trust in a quantitative study's findings (Castleberry, 2014). Increasingly individuals reading and reviewing research studies have attempted to apply the same criteria to qualitative studies (Castleberry, 2014). As noted by researchers such as Guba (1981) and Shenton (2004), the use of quantitative terms to demonstrate qualitative rigor is just not practical. In his seminal work, Guba discussed the ongoing conflict between the quantitative and qualitative methodologists concerning reliability and validity. Guba asserted that the primary goal for all researchers was the development of trustworthiness by demonstrating rigor. According to Guba, how a researcher demonstrates trustworthiness (rigor) in

his/her study varies depending on the type of study, be it quantitative or qualitative.

In his 1981 study, Guba posited a specific set of criteria for qualitative researchers to follow for demonstrating rigor and establishing trustworthiness. According to Guba, his criterion applies to all qualitative methods and designs. Guba's four qualities for trustworthiness are credibility, transferability, dependability, and confirmability. In 2004, Shenton expanded Guba's work by identifying specific qualitative strategies that a researcher could use to demonstrate Guba's qualitative factors for trustworthiness. To establish trustworthiness and demonstrate rigor in this study, I chose to use a number of Shenton's strategies as discussed below.

### **Creditability**

According to Shenton (2004), credibility answers the question of how closely the findings are indicative of the real world; thus ensuring the researcher has recorded the experience both accurately and truthfully. For this reason, it is easy to understand how the demonstration of credibility is vital to establishing trustworthiness (Lincoln & Guba, 1985). As Shenton (2004) discussed, there are several ways to demonstrate credibility. The list includes actions such as (a) the adoption and adherence to established research methods, (b) develop relationships with the participating organizations before commencing data collection, (c) proper identification and sampling of participants, and (d) the use of methodological triangulation (Shenton, 2004).

As previously noted, any overlapping strategies employed by the researcher will aid in increasing the level of credibility (Loh, 2013). As a researcher increases the credibility of the study, the overall trustworthiness also increases (Lincoln & Guba,

1985). To increase the credibility of this study, I applied the following overlapping strategies. I followed many of Shenton's (2004) previously documented procedures for completing the qualitative single case study. To ensure only individuals capable of providing rich, meaning data were eligible to serve as participants; I used purposeful sampling, similar to the process used by Gentles, Charles, Ploeg, and McKibbon in their 2015 study. As Hennink et al. (2017) posed in their study, I planned to continue conducting interviews until I saw evidence of data saturation. As Loh (2013) did in his study, I used member checking to improve data transcription and analysis accuracy. To ensure transparency, I defined the measurement process for monitoring data saturation. Lastly, I used methodological triangulation of data collected from the semistructured interviews, the focus group, and existing company documentation consisting of project summary and lessons learned reports.

A researcher uses member checking for two reasons. The first is to ensure proper interpretation of the interviewees' experiences. The second reason is to afford the participants the opportunity to provide clarification or further elaboration of details (Loh, 2013). The sharing of research findings with participants is a common practice used by researchers. However, not all researchers believe in the positive aspects of member checking (Harvey, 2015). One concern discussed is the ethical considerations of permitting participants the opportunity to influence the interpretation of data.

Documenting data saturation helps to increase the creditability of a study (Houghton et al., 2013). Data saturation is evident when no new themes are evident, and the datum becomes repetitive (Hennink et al., 2017). Sufficient data had to be collected to

ensure I reached data saturation within the scope of the study. The use of the proper sample size with methodological triangulation and member checking provided this assurance. The data obtained by interviewing three business managers, a focus group of six employees, and relevant project team reports proved sufficient to reach saturation. By the time I completed analysis of the third interview, I felt confident that data saturation had been achieved. While the third participant provided more detail and clarity, there was no new information. Analysis and comparison of the focus group data with the interview data helped to confirm saturation. In a situation where saturation had not become evident, participant interviews would have continued until saturation was confirmed by a lack of new findings.

### **Transferability**

The ease with which another researcher can apply the findings of one study to another study or a different context is referred to as transferability (Shenton, 2004). Transferability for this study meant the results were applicable to different types of business teams, in different types of industries. The greater transferability and applicability of this study's findings, the more beneficial it becomes to the business world. The judgment of transferability is the responsibility of potential users (Houghton et al., 2013). Only the potential users know the content of the secondary situation to which they are attempting to apply (transfer) the findings. To aid in this evaluation, I tried to provide rich, detailed descriptions throughout the study. With this information, readers can determine the applicability of the study to their situations. Both Shenton (2004) and Houghton et al. (2013) agreed the best way for readers to make transferability

decisions is to include as much detail as possible in the study's write-up. Section 2 information such as participant backgrounds, both participant and organizational eligibility criteria, the data collection methods, the research settings, and other transactions and processes will aid readers and fellow researchers with their transferability determinations.

### **Dependability**

Rennie (2012) defined reliability as the accuracy of measurement. Poor accuracy of the data could negatively influence the ability of other researchers attempting to replicate the original study. In a qualitative study, reliability equates to the measure of dependability regarding the procedures and methodology used by the researcher (Guba, 1981). Readers and reviewers will carefully scrutinize a study with particular attention given to the procedures related to the identification and selection of samples, and how a researcher collected and analyzed data (Shenton, 2004).

According to Houghton et al. (2013), openly developed audit trails are an effective method for demonstrating dependability. When a researcher uses audit trails, they are demonstrating reliability and dependability of their data and findings. Through audit trails, readers can (a) retrace all logic decisions, which lead to data interpretations or theories, (b) understand how the researcher handled biases, and (c) openly see information concerning who did what with the data, when and why (Agius, 2013).

As an added boost to the quality of the audit trail the researcher should employ as many overlapping methods as practicable (Loh, 2013; Shenton, 2004). The use of a reflective log (as an audit trail) will document the reasons for why and how the researcher



made particular decisions, thus providing readers a better understanding of how the study process transpired (Darawsheh, 2014; Farrelly, 2013; Houghton et al., 2013; Kornbluh, 2015). The more details provided, the more transparent the study becomes. As noted by Holland et al. (2013), transparency helps to build trust, which strengthens the researcher-participant bond.

According to Loh (2013), one method to maximize the dependability of a study is to use overlapping tactics. The use of a reflective journal allowed me to review and evaluate the effectiveness of my processes (Darawsheh, 2014; Farrelly, 2013; Houghton et al., 2013; Kornbluh, 2015). As discussed by Doody (2013) and Jacob and Furgerson (2012), a researcher can use an interview guide (see Appendix A) to help ensure they treat all interviewees equally. A researcher may improve the accuracy of their data, minimize researcher bias, and increase the reliability of their data by following a protocol guide and recording participant interviews (Doody, 2013; Jacob & Furgerson, 2012). For this study, I used a combination of the above actions. As previously discussed, I followed a standardized interview guide, recorded all participant interviews, and used journals (reflective logs) for recording nonverbal details related to participant interviews and other factors associated with the data collection and analysis processes.

### **Confirmability**

The qualitative measure of objectivity is confirmability. According to Shenton (2004), the researcher, as a human individual, has influenced (in one way or another) everything related to a study. According to Shenton, this is the main problem associated with objectivity (confirmability). Thus, ensuring the researcher's perceptions and biases

have only a minimal influence the findings of the study is a key factor in maximizing the level of objectivity (Guba, 1981; Shenton, 2004). Researchers need to ensure the results are true representations of the participants lived experiences and not skewed by researcher perceptions and biases (Shenton, 2004). The researcher maximizes confirmability by eliminating or reducing personal perceptions and biases, thus ensuring the accuracy of the results.

In this study, I maximized the confirmability through several strategies. First, I provided open reflections of my personal experiences and perceptions such that readers have a full disclosure of the facts (Abbaszadeh et al., 2015). Second, by fully explaining the logic behind all my interpretations and conclusions, readers can see the findings are an accurate representation of the participants' data. In addition, the use of an interview guide helped me to ensure all interviewees were treated equally while ensuring they were all asked the same questions (Doody, 2013; Jacob & Furgerson, 2012). Lastly, recording the interviews, improved the accuracy of the data (Seidman, 2013).

### **Transition and Summary**

In Section 2, I discussed specific details about the performance of the study. My role as the researcher; my relationship and responsibility toward the participants; and the research method and design were discussed in detail, displaying my understanding of the research method requirements while ensuring transparency of the study's processes. I provided the readers a thorough explanation of the population and sampling methods; ethical research; and explained the data collection instruments, methods, and analysis processes. The final topic discussed was my strategy for maintaining and displaying

reliability and validity. Section 3 contains the conclusions of my research, an explanation of my findings and how this information applies to real world applications relating to the selection of business team members, and a discussion of future research that could add to or expand the findings of this study.

### Section 3: Application to Professional Practice and Implications for Change

This section includes an overview of the study, the purpose and research questions, and a brief summary of the findings. Following the introduction, I provide a detailed presentation of findings and discuss applications to professional practice and implications for social change. I then offer recommendations for action and future research, reflect upon various aspects of my doctoral journey and completion of this study, and end the paper with a brief conclusion.

#### **Introduction**

The purpose of this qualitative, single case study was to explore the strategies that business managers have used to determine team fit when selecting employees for assignment to cross-functional project teams. The case study consisted of a single, nonprofit, professional organization recognized throughout their industry for their superior performance and leadership. Over the past 5 years, various top-level managers have received third-party awards and recognition in areas ranging from diversity and inclusion to volunteer of the year and as being one of the 50 best women in business. The sample population for the study consisted of three senior managers and a focus group of six employees. Semistructured interviews of the project's management team provided the primary data for this study. I accomplished methodological triangulation via the use of a six-member focus group and a review of applicable organizational documents. I completed a manual analysis of the data first followed by a secondary analysis using the QDA application NVivo 11.0. In my analysis, I identified three primary themes relating to strategies used for determining person-team fit. Organizational managers used the

strategies for identifying and selecting team members. The first theme was the identification and use of personality traits and work ethics. The second theme was the identification of job specializations and skills. The third theme was to have the proper diversity across the team to aid in maximizing the first two themes. Additionally, I identified one emergent theme. This emergent theme supported the importance of having the proper leadership.

### **Presentation of the Findings**

In my findings, I refer to the three primary participants as Mgr-1, Mgr-2, and Mgr-3. For the focus group, I refer to the members as FGM-1 through FGM-6. The use of these codes in place of their names help to maintain the anonymity of the three participants and focus group members.

The central research question that guided this study was the following: What strategies do business managers use to determine team fit when selecting employees for assignment to cross-functional project teams? Using purposive sampling, I was able to collect a wealth of rich, descriptive data from my participants. Through my analysis of the data, I was able to develop an understanding of the various strategies each manager focused on while going through their selection process.

After reviewing the informed consent form with each participant, I restated the research question to the participant. I did this to ensure that each participant fully understood we were discussing selection strategies and not just basic personnel management principles. Though related, the focus of the study was not to determine what

strategies are used to reshape or mold a newly formed or existing team but to determine the strategies that are used to build the strongest, most efficient teams from the start.

The organization that was the basis of this case study was in a sense a new organization, due to their recent merger with another organization. Although the project for merging the two companies formed the focus of discussion during data collection, I encouraged participants to reflect back and comment on all aspects of their team member selection processes. The participants interviewed for this study were two senior managing directors and a manager, which formed the basis of leadership for the merger project.

Although I did not start my actual data analysis until I had completed all of my data collection, a few things became evident early in the data collection process. There was no formal policy on how managers should form teams (Mgr-3). Because there was no policy for implementing teams, project managers were free to establish teams as they desired (within limits). There were no tests for skills or knowledge, and no type of personality assessment given. The primary tool or strategy managers used for identifying and selecting team members was their knowledge of the employee and how the managers perceived each could/would fit into the design of the team. Whether the managers realized it or not, the three participating managers were using the theory or concept of person-group (PG) fit as their key strategies for selecting the project team members. PG-fit, as posed by Werbel and Gilliland (1999), is different from both person-job (PJ) fit and person-organization (PO) fit. PG-Fit is used to understand how the social interactions between team members may influence the performance of the team (Kristof-Brown, Seong, Degeest, Park, & Hong, 2014; Werbel & Gilliland, 1999). By looking at not just

individual personalities, but also at other factors such as the individual's work ethics and attitude toward working on teams, the three participating managers had engaged in a selection strategy based upon PG-Fit.

Lin, Yu, and Yi (2014) reported that positive affect and PG Fit displayed a positive correlation with increased performance. The following themes bind together to create an environment such as that posed by Lin et al. The following themes also tie directly back to the conceptual framework of this study. The conceptual framework consisted of three theories: (a) Werbel and Gilliland's 1999 theory of person-group fit, (b) the FFM of personality (McCrae & John, 1992), and (c) Tuckman's 1964 theory of personality and group behaviors. The three theories provide a foundation for understanding the importance of team fit and personality traits, which managers should know to use effectively as selection strategies.

### **Theme 1: Personality Traits and Work Ethics**

I found that the participants had three primary areas that they focused on during the team formation process. These three areas were individual personalities and work ethics, job specializations and skills, and diversity. As I interviewed each participant, I was able to identify the personalities that each participant seemed most interested in locating. As I performed my data analysis, it became evident the participants were looking for the same primary characteristics for their team members. All three participants stated a desire to find employees who were reliable, self-starters, team players, and whom they could depend on to, "Get the job done." (Mgr-1; Mgr-2; Mgr-3).

Zikmund, Babin, Carr, and Griffin (2013) discussed the validity of direct observation as a means for collecting data about phenomena and individuals. Through direct observation, managers are able to recognize and learn about the individual qualities of employees with whom they work with on a regular basis. However, the three participants did not know all of the employees. Some of the employees came from across departmental lines and from the other company involved in the merger. During my discussion with Mgr-1, I found that s/he routinely worked with employees from different departments, which helped but did not give the manager insight into all the possible team member candidates. Mgr-2 also worked across departmental lines, but also had limited knowledge concerning some employees. Mgr-3, however, was a different story. This participant had a seat on the organization's employee performance review board. This board position provided Mgr-3 access to almost every employee's performance record within the company. If Mgr-3 did not know the employee personally, it was a matter of reviewing the employee's annual performance review to determine if the individual had the desired characteristics for the team.

Should the occasion arise that a participant did not have enough information about an employee, he or she would ask the employee's direct manager for input concerning the individual's character, work performance, and ability to effectively function within a team environment (Mgr-2, Mgr-3). Additionally, various managers would often voluntarily provide the participants with unsolicited inputs and recommendations concerning employees (Mgr-1, Mgr-2, Mgr-3). It was common for individual employees to do the



same thing, providing recommendations on fellow employees whom they believed would be great additions to the team (Mgr-2, Mgr-3).

As I discussed the interview questions with the participants, I found it interesting that the organization did not use any professional assessment tools during the team selection process. Assessment tools such as the Myers-Briggs Personality Type Indicator, the Minnesota Multi-Phasic Personality Indicator, and the Strengths Finders 2.0 have all been documented to have positive results in helping to identify the best candidates for various types of jobs and careers (Pecena et al., 2013; Rose, Arnold, & Howse, 2013). The three participating managers felt comfortable making selection decisions based on their personal knowledge of the individual employees. When asked about assessment tools they may have used during the team member selection process, Mgr-1 stated, "None, I did not use any specific tools for assessing the individuals. It was just a matter of my personal knowledge of them as to how they do their jobs and work with other employees." Mgr-2 stated, "I never use anything. When it comes to who to pick for a particular seminar or a particular project it really, I would say, in the end, the first thing that we would look for is expertise." Mgr-3 stated, "I'd like to say that I used them for this. The main assessment tools that we used were the 5-point assessments that we do with their performance assessments."

Regarding professional personality assessments, Mgr-3 stated, "I think they're good. I have used them in the past. We've used several different personality profiles for different tests." As noted above, however, a professional personality assessment was not used for the organization's most recent project. The participants had two options

regarding their assessment of perspective team members. They relied on their personal, first-hand knowledge of the employees, or the participant had to speak with the employees' manager to gather the details they needed to make their decision.

Bradley, Baur, Banford, and Postlethwaite (2013) linked certain personality characteristics to increased job performance. Some characteristics act as moderators for team cohesion, social connectedness, and increased creativity (Kaufman, Pumacchua, & Holt 2013). Some of the participant statements that supported the personality and work ethics theme included Mgr-1 statements, "I try to think about how helpful they are going to be and how willing to share information" and "I looked for someone who is going to play well with others." Mgr-2 statements' included, "The follow through to me has always been really important" and "I definitely want somebody who is intelligent, but not judgmental." Mgr-3 stated, "I consider people who were very action oriented" and "I needed people who were problem and solution focused." All of the three participants reflect the management team's focus on their strategy to identify individuals who were known to be team players, who had a willingness to share information, were dependable, and could be counted on to complete assigned tasks. These characteristics are factors recognized in prior literature to positively influence social connectedness and team cohesiveness (Aeron & Pathak, 2016). Table 1 below provides a breakdown of the number of discrete code occurrences, their frequency, and relative percentage regarding the theme of personality and work ethics. I combined these two items (personality traits and work ethics) due to the board range of overlapping characteristics.

Table 1

*Frequency of Codes Relating to Theme of Personality and Work Ethics*

Code	N	%
Collaborative / sharing	7	14.30%
Works well with other employers / a team player	5	10.20%
Works until the job is finished	4	8.20%
Willingness to help others	4	8.20%
Excited, energized	4	8.20%
Nonjudgmental	3	6.10%
Positivity	3	6.10%
Knowledgeable / Intelligent	3	6.10%
Problem / Solution focused	2	4.10%
Does his/her job/is responsible/dependable	2	4.10%
Can do attitude	2	4.10%
Does his/her job/is responsible/dependable	2	4.10%
Hard worker	2	4.10%
Proactive, Action oriented/Self Starter	2	4.10%
Quick Learner/good listener	2	4.10%
Proud/Takes pride in their work	2	4.10%

*Note.* N = the number of frequency of that particular code. % = the percentage of total frequency of that particular code.

During the interviews, the participants did not just state these as objectives; they made it clear these were imperatives, must-have qualities for each team member. As I sat and watched the participants, I could hear their voice rise, see their eyes open wider, and watch their hands move in an attempt to emphasize the importance of the various characteristics. Many of these characteristics were important enough to the different participants that they repeated them several times throughout the course of the interview and again during the member checks.

Aeron and Pathak (2016) posed that certain personality traits help to form cohesive, socially connected teams. Having the correct personality traits can help to create a positive internal environment for the team. According to Daspit, Justice Tillman, Boyd, and Mckee (2013), a positive internal environment will positively influence team

cohesion and, thereby, promote improved performance. The three participating managers had 16 discrete references to personality characteristics. Combined with repetitive occurrences, they referenced personality and work ethics 60 times. Based on these numbers, the three participating managers understood the importance of having a team with the right personality characteristics and work ethics.

Theme 1 ties directly back to all three of the theories that make up the conceptual framework for the study. The participants' desire to find a diverse group of employees with personalities and job skills aligns with both Werbel and Gilliland's 1999 theory of person-group fit and the FFM of personality by McCrae and John (1992). The participants expected a certain behavior from the team based upon personality traits and skills, which was consistent with Tuckman's 1964 theory of using personality traits as a predictor of group behaviors.

## **Theme 2: Job Specialization and Skills**

During the interviews, the participants discussed the need to identify the employees with the proper skills and experience to be on the team. Mgr-3 stated, "Okay, we need to have a team that's big enough to accomplish the goals, but not too, too big that people are stepping all over each other." The team had to be large enough to include sufficient personnel to cover all of the requisite skills and knowledge areas; yet, it could not be so large it was unmanageable. Mgr-1 stated, "As I plan my team, I think about who might know that particular segment of the organization best and I will usually go for them." Mgr-2 had a slightly different perspective stating, "I always look for a coordinator who has the expertise and who is respected by other people."

The participants made it clear that employees considered for the project team had to meet multiple requirements. First, the managers looked for the employees who had the desired personality characteristics as discussed above under Theme 1. Second, the managers also had to ensure that potential team members had the requisite skills and experience necessary to complete the task associated with the project. As Mgr-1 stated, "It is definitely the skills and it is (having) the right people. If I hear that someone has a certain skill set I'm going to go after that person for that particular team or project."

Some of the skill requirements for this project included knowledge of the various software applications, such as database specialist and website designers. These skills were evident through two separate statements made by Mgr-3. Mgr-3 stated, "This was a huge, huge deal for us, merging the two companies. We actually merged two databases at the same time, two entirely different sets of clients, the whole thing," which was an indication of the need for a database specialist. Mgr-3 stated,

Because it's a website serving a community of people with Jurist Doctorates, we need to make sure we had a fair amount of people that had a high education level to filter the content and make sure that it was sufficiently set up (personal communication, September 9, 2016).

During the data analysis, I found that all of the participants (3/3) had referred to the need for having team members with specific skills and knowledge. As Table 2 shows, Mgr-1 made five discrete references to the need for team members with skills, or nine references if we include repetitive occurrences. As for a strategy, Mgr-1 summed it up best with the following statement: "As I plan my team, I think about who might know

that particular segment of the organization best and I will usually go for them." Mgr-1 explained that recalling prior projects and work experiences with different individuals was a key to finding possible team members.

Mgr-2 made eight discrete references to the need for identifying individuals with the desired skills or training, or 19 total references when including repetitive occurrences. Statements by Mgr-2 included, "I want somebody who is very knowledgeable about a particular area and who has good ideas" and "not just somebody who has the expertise, but somebody that other people recognize has expertise." Because Mgr-2 routinely interacted with external professionals, there was no internal record of prior work experience to draw on. Mgr-2, therefore, relies on news, professional journals, and various types of social media to identify possible team members and participants for projects as needed. By staying current on the various professional groups and organizations, Mgr-2 has been able to identify the external individuals in each field who are best suited for the various projects undertaken. I stopped reviewing here. Please go through the rest of your section and look for the patterns I pointed out to you. I will now look at your reference list.

Mgr-3 was the lead for the last major project. While everyone on the team had a vested interest in the success of the project, Mgr-3 seemed to express more personal interest and motivation towards the success of the project. Since Mgr-3's name was to be on the final report, there was an obvious concern for the results. As I conducted the interview, I sensed a depth of passion concerning the project, a strong sense of pride in how well the team performed, and their ultimate success. The underlying factor to all this

was the teams' level of knowledge and skills, not just within their areas of specialty, but also concerning the organization's functions and business processes. The ability for Mgr-3 (as well as the other participants) to have the foundation to accurately identify the best performers in a diverse array of specialties was in itself a key ingredient to the success of the merger project. A key advantage Mgr-3 had over the other two participants was having access to the yearly performance reviews of all the employees. For the unknown employees who had never worked with Mgr-3, the performance reviews provided Mgr-3 all the information necessary to paint a reliable picture of the employee's personality, skills, and work ethics. As Mgr-3 stated:

I was lucky enough to have a seat at that table for everybody, basically, in the building. I had an inside understanding of what each one of these people had been doing in their individual environments, including their strengths, weaknesses, and their performance evaluations (personal communication, September 9, 2016).

My interview with Mgr-3, however, took this to a different level. Mgr-3's praise of the team for their success in completing the project and winning a major award was evident throughout the interview. Mgr-3 made several statements of praise for the team such as, "They knocked it out of the park," and, "They exceeded my expectations." My analysis of Mgr-3's interview correlated directly with the previous two interviews, only with more emphasis relating to the necessity to identify potential team members had the requisite knowledge and skills. As Table 2 shows, Mgr-3 had nine discrete references to skills specialization and knowledge. When we include the repetitive occurrences, this total goes up to 22 references. Some of the comments Mgr-3 made regarding this theme

included, "What we did was we stepped back. I looked at the entire population of people. I made sure that I had an understanding of who was in each seat and who the key players that merged." The deciding factor in selecting potential team members for Mgr-3 was not a matter of simply how long an employee had been in a position. First, Mgr-3 had to feel confident that each potential team member had a clear understanding of the business process for his or her area of consideration. Second, Mgr-3 had to believe the individual could provide the required knowledge and skills to be an asset to the team.

The fundamental concept demonstrated by the three participating managers is Person-Job (PJ) Fit. As discussed by Hamid and Yahya (2016), PJ Fit is matching an individual against the requirements of a job. The use of PJ Fit is a proven method for increasing the employee performance while achieving improved results. Based upon the total number of comments referencing job specializations and skills (22 discrete and 50 total instances when counting repetitive occurrences); the significance of this factor for the participants as a requirement and strategy for identifying and selecting team members is clearly evident.

Table 2

*Managers: Job Specialization and Skills (Frequency)*

	Discrete Responses	Interview Questions	Total Responses*	Question Numbers
MGR-1	5	1, 2, 8	9	1, 2, 3, 4, 8
MGR-2	8	1, 2, 5, 7	19	1, 2, 3, 4, 5, 6, 7, 10
MGR-3	9	1, 2, 5, 7,	22	1, 2, 3, 5, 7, 8, 10

*Note.* \* Total responses include discrete answers plus repetitive occurrences of the discrete answers.



**Theme 3: Diversity**

Diversity also played a significant role in the selection of team members and was the third major theme identified during the data analysis process. Mohammed (2013) posited that when it comes to diversity, even simple differences such as how individuals view time might influence the relationships and performance between diverse individuals. Mach and Baruch (2015) reported that heterogenic teams with the right balance of diversity can improve team cohesion and effectiveness. When I asked the participants to explain how diversity impacted their strategies and decision-making, 67% of the participants (2/3) each had six or more discrete comments relating to diversity, with both participants providing explicit details as to the importance of diversity in their decision-making process. Comments that Mgr-2 made include, "I always say it's important to include people. Keep all diversity in mind, so whether its ethnic diversity, diversity in areas of practice, diversity in geography. Its cultural," and, "All diversity is important, especially for attorneys because from an educational perspective people have different ..., It is important for the people attending to hear the different perspectives that come from having a diverse group."

Comments about diversity that Mgr-3 made include, "In this particular case, we were lucky in that we were able to build a larger team and we had men and women, people of different racial backgrounds or people of different religious backgrounds, the whole thing," and, "I think the more perspectives you had, the better it is, especially for our website. You have all kinds of cultural considerations that you need to pay attention to." One participant did not even consider diversity. As that participant stated, "I didn't

look at the various aspects of diversity. I just looked at whoever had the skills and knowledge and were going to help us get it done."

Through my data analysis, I found 28 total references (including repetitive occurrences) made by the participants concerning diversity (see Table 3). According to Attiah (2014), diversity is no longer just a measure of black and white. Diversity is more than differences in gender, race, and cultures. Diversity today includes factors such as age, education, skills, experience, or simply stated, diversity can be anything that makes two or more individuals different (Attiah, 2014). The two participants (Mgr-2 & Mgr-3) who identified diversity as a factor or strategy for identifying and selecting individual team members gave near textbook reasons for doing so.

The following statements made by Mgrs 2 and 3, help explain the logic of their reasoning regarding diversity. Mgr-2 stated, "It can be still very difficult to convince people of the value of diversity, but it is valuable," and, Mgr-3 stated, "I look to build the best team that I possibly can," and, "If the best team includes that I need diverse perspectives, that's great." Mgr-2 and Mgr-3 were looking for ways to ensure the results of the project reflected the entire organization and was not a product reflecting the desires or needs of a limited portion of the employee population. The participants realized that diversity would provide them a diverse pool of individuals with different experiences, likes, and dislikes, all factors that would help to ensure the end product of the project was valid representative of the new organization's demographic posture. As Mgr-3 said, "We're a milkshake. This is a color-blind organization," and, "I'm a big believer in having

different perspectives.” Mgr-2 also stated, "You need perspective from men, women, and people of all backgrounds."

Table 3

*Managers: Diversity (Frequency)*

	Discrete Responses	Interview Questions	Total Responses*	Question Numbers
MGR-1	0	-	0	-
MGR-2	7	4, 5, 6, 7, 10	13	4, 5, 6, 7, 9, 10
MGR-3	6	1, 5, 6, 10	15	1, 5, 6, 7, 8, 9, 10

*Note.* \* Total responses include discrete answers plus repetitive occurrences of the discrete answers.

Mgr-2 seemed to become somewhat excited during the discussion of diversity. Mgr-2 gave me the impression diversity was a necessity. According to Mgr-2, "It's important to include people. Keep all diversity in mind, so whether its ethnic diversity, diversity in areas of practice, diversity in geography, or if it is cultural. All diversity is important," and, "Yes, I would say diversity is very important. Not always, an easy sell by the way. I mean it can be still very difficult to convince people of the value of diversity, but it is valuable." This participant is responsible for a department, which recruits professionals to lead various teams. These teams host training functions over a diverse range of topics. To host a successful event, Mgr-2 must ensure the individual leading each team is current in their field, a recognized expert, and is someone who can draw sufficient attendees for the event to be profitable. Mgr-2 uses diversity to create every advantage possible for soliciting and attracting event attendees. As noted above, Mgr-2 uses all types of diversity including age, gender, profession, and cultures to find team leaders who will be able to promote each event the best.

Mgr-3 also expressed the importance of diversity as a selection factor. Mgr-3 referred to finding individuals with the right knowledgeable and skills, able to cover all the relevant topic areas. Mgr-3 stated, "We picked the subject matter experts from both sides of the organizations that merged," and, "Made sure we covered all of our relevant subject areas, ...from our education division, ...from our AV sort of product line, and ... our marketing people." Mgr-3 also discussed the need for team members of varying ages. According to Mgr-3, "We had people kind of on the later end of their career, some people at the early stages of their career because, from a web standpoint, it is helpful to make sure that people can navigate and understand the concepts that we were putting out there." Mgr-3 was also careful to include a balanced gender diversity, explaining, "In a dominant male industry, our organization is female dominated."

Some of the other diversity factors discussed were education levels, ethnicity, culture, and religion. Mgr-3 explained that their organization has a very diverse employee base, and the team was a good representation of the organization's employee base. Having a diverse team from this employee base helped to ensure the product was a reflection of the organization's diverse population and not just something one group such as management had pushed out.

### **Emergent Theme 1: Leadership**

Though the participants never directly stated how they intended to lead the team, I was able to glimpse clues to each of their leadership styles during their interviews and how their leadership styles might influence their selection strategies. As each interview unfolded, my understanding of the participant's selection strategy grew stronger. The 6-

member focus group discussion helped to validate my analysis of the three participants' selection strategies and leadership styles, especially regarding Mgr-3.

The project for merging the two organizations was a working project. Saying it was a working project meant that all team members would continue performing his or her regular duties while completing all the work necessary to accomplish the merger. For this project to be successful team members would have to work extra hard, and be willing to put in extra hours. Team members had to plan and schedule their time and resources to work efficiently between both their regular duties and the task associated with the project. As FGM-3 stated,

It's got a little overwhelming when you had to do that, but you also have to do your regular work at the same time. I guess moving information from the old website, which took a lot of work. We did it fast, but it still takes a lot of work, but then you have to remember that your actual work is a priority, so it makes it harder to juggle both at the same time (personal communication, September 9, 2016).

Mgr-3 also commented, "All I asked and then some they gave me. People stayed late, came in early. Could not ask for more." Realizing the task ahead of them was huge, the participants recognized the necessity for identifying their top performers, individuals who could be relied on to take charge of their assigned tasks and work them through to completion. As Mgr-2 explained, "I want somebody who could carry out whatever the task was." Mgr-3 was looking for, "Self- starters and independent workers, problem solvers, not problem identifiers."

Other examples from the focus group include: FGM-4 stated, "There was definitely a lot of cross collaboration" and then FGM-2 said:

Mgr-3 never takes full credit for something like that. Mgr-3 always throws you into the spotlight as well and makes you feel really appreciated as well on top of it. So, it's always really encouraging to continue to do more (personal communication, September 9, 2016).

FGM-3 stated, "Overall, I think it was very positive and the leadership was very responsive in support of us." FGM-3 also stated:

I think what also helped is Mgr-3. You know, Mgr-3 is really good at picking people who would know how to do everything that we did best so we all have more of a technical advantage over other people, so probably that's why Mgr-3 chose us to begin with and why we didn't really have a problem (personal communication, September 9, 2016).

In addition to the focus group comments, other factors helped me understand the participants' strategies and leadership styles. First, one of the three participants was the project's team lead. The team lead bore the overall responsibility for the project's success or failure. As Mgr-3 stated:

In addition to everything else, I was personally on the hook to present this to our board of directors. This was something where I knew brand *Mgr-3* was behind. When I was picking these people, I needed to have good people (personal communication, September 9, 2016).

The stress associated with this type of responsibility could easily have a negative influence on a manager's leadership style (Halverson, Murphy, & Riggio, 2004). As a transformational leader however, this manager expressed a strong desire to ensure the team was a democracy and not a dictatorship. As Mgr-3 stated:

I also tried to make sure that I did a fair amount of work throughout the whole project so that people saw that I was in it with them. That it was not a dictatorship. That I was working also (personal communication, September 9, 2016).

According to Lorinkova, Pearsall, and Sims (2013) while teams initially perform better with directive leadership, once the team gets going and things stabilize they perform much better with an empowering leader. Empowering the team improves job satisfaction and demonstrates both confidence and trust in the team (Al-Ababneh, Al-Sabi, Al-Shakhsheer, & Masadeh, 2017; Ma & Weng, 2015). Mgr-3 was very good about empowering the team. When there were questions or problems, FGM-1 said, "Mgr-3 would say, "Have a discussion about it or See if you can figure it out and if you can't, come back to me and I'll help you out." According to FGM-1, "Mgr-3 also gives you the opportunity to go, "Okay, can I figure this out on my own?" FGM-5 followed up FGM-1's comment by stating, "Yeah, Mgr-3 makes you feel very empowered to be able to do the process."

Even though Mgr-3 was willing to permit other team members to make different decisions, the right to veto was always present. As Mgr-3 stated, "I made sure there were a fair amount of questions that went to the team where they solved them together," and,

"It was democratic in that I had an ultimate veto right over the whole thing because this was my project." Mgr-3 would offer other suggestions or ideas to redirect the team through a collaborate process. Mgr-3 planned to be very involved with the team, to constantly check the team's progress, offer advice and guidance as may be necessary, and to even assist with different types of task where and when possible. Mgr-3 indicated the desire to ensure the team understood that management was interested in what the team was doing, how they were doing it, and most importantly that management was there to support the team. Mgr-3 also indicated the importance of being a positive influence and team motivator by offering recognition for their various successes and wins. Mgr-3 specifically stated:

It's of importance to me that if somebody's performing well on a team, for example, that they're recognized, and if they've gone above and beyond, that they're recognized on their evaluation above and beyond what somebody else might be somewhere else along the way (personal communication, September 9, 2016).

And, according to FGM-4, "I will say, though, that Mgr-3 is one of the few who ever says thank you for anything for much work that you do. You don't usually get recognized in the other departments."

Mgr-1 approached the selection process thinking about three factors, "how helpful the members are going to be," "how willing to share information," and "who were good team players?" Mgr-1 planned to help keep the team's motivation high by "acting as the team's cheerleader and always painting a positive picture." Both Mgr-2 and Mgr-3



wanted, "Action-oriented individuals, who would take ownership of a task and see it through to the end." Mgr-2 was looking for individuals who, "plays well with others," and, "who is intelligent, but not judgmental." Then, Mgr-3 stated, "When I'm picking these people, I needed to have good people." Mgr-3 needed, "empiric evidence," and to ensure, "that everybody was good in their respective areas beyond what I just see in my experience." By having a clear understanding of the desired personalities traits, work ethics, and skills, the three participants went into the team implementation and development stage demonstrating strong proactive leadership styles, and a solid strategy for implementing what they thought would be a cohesive, functional team.

Table 4 below shows that Mgr-1 had three separate or discrete references to factors relating to leadership traits, and six instances when including repetitive occurrences. When asked to summarize what made the project a success, Mgr-1 stated, "The people, the directors who were in charge of our team, and the managers on our team, we had some great direction. They were great to work with." Mgr-2 also had three discrete references to items relating toward leadership, with a total count of seven different references when counting repetitive occurrences. Some of the specific comments by Mgr-2 providing leadership guidance included, "I try to urge the programming attorneys here to consider diversity more and more and all the different teams that I work with," and, "To help the team stays focused on strategy from an unemotional perspective." Mgr-3 demonstrated a variety of leadership qualities. Some of Mgr-3's statements, which demonstrated specific leadership qualities included, "You have to be able to roll with the punches on a project launch like this." demonstrates Mgr-3's

flexibility. Whereas, Mgr-3's statement, "I think the big thing about the team is that, it's by design, but we really had a very positive, yes it can be done, anything can be done if we can think of it, outlook." demonstrates Mgr-3's understanding of how positive attitudes can influence performance.

Table 4

*Managers: Leadership (Frequency)*

	Discrete Responses	Interview Questions	Total Responses*	Question Numbers
MGR-1	3	1, 7, 10	6	1, 7, 8, 10
MGR-2	3	4, 7, 10	7	1, 4, 7, 9, 10
MGR-3	7	1, 2, 4, 5, 7, 10	13	1, 2, 4, 5, 7, 9, 10

*Note.* \* Total responses include discrete answers plus repetitive occurrences of the discrete answers.

As a group, the three participants referred to a number of other desirable factors they looked for within the employees, but to a lesser degree. Many of these factors became subthemes that were bundled into the major themes. Such as when Mgr-2 stated, "They're just so excited that the group is a unit" was linked with other similar terms such as *being positive* under the theme of personality and work ethics. Mgr-2's use of the terms *intelligent* and *nonjudgmental* in the statement, "For the team fit I definitely want somebody who is intelligent, but not judgmental" were grouped under the theme of personality and work ethics. The terms *education* and *degrees* found in Mgr-3's statement "I needed to ensure they had the education, degrees to ... " were grouped under diversity. Additional terms such as *energized*, *a culture of teamwork*, *is responsible*, *dependable*, *positive feedback*, and *open communications*, were also grouped under the theme of

personality and work ethics. The use of these and many other terms became sub-categories that easily clustered into the main themes.

### **Methodological Triangulation and Saturation**

After the participant interviews, I conducted both a focus group discussion and a review of available organizational documentation. According to Carter, Bryant-Lukosius, DiCenso, Blythe, and Neville (2014), triangulation affords the researcher the opportunity to increase their participant base and thereby increase the richness and validity of their data through a more diverse group of participants. The reason I conducted these two additional data collections was to provide a means for performing methodological triangulation to improve the richness and validity of my data.

There was also the matter of confirming data saturation. Fusch and Ness (2015) posed that analyzing data from multiple sources helps to ensure saturation. Following my initial analysis of the three participant interviews, I felt confident that I had reached data saturation. The participant data analysis shows a high degree of similarity between the data collected from Mgr-1 and that collected from Mgr-2 and Mgr-3. The only new data coming from Mgr-2 and Mgr-3 was the details of how diversity played a factor in their selection strategies. The only other difference in the data between the three participants was the use of different synonyms and how they expressed each trait or characteristic. For example, Mgr-2 wanted diversity as a means to draw in a diverse group of attendees, whereas Mgr-3 used diversity as a method to avoid groupthink. Another example is between Mgr-1 and Mgr-3. Mgr-1 planned to act as the team's cheerleader to help keep up team motivation and spirits. Mgr-3, however, provided positive feedback similar to

Mgr-1 but also empowered the team members by delegating a level of decision-making authority to the team members and by assisting the team in certain tasks. These variations in data are what created theme repetition and subthemes, but did not provide any new data.

As I conducted my analysis of the focus group discussion, I could see a correlation with the data from the interviews. The six-member focus group was very informative providing many comments that tied directly into the three of the four themes identified from the interview data, yet they did not present anything new or different from the participant interviews. Comments such as FGM-1's, "I think I'm a good team player." and FGM-4's statement, "Mgr-3 looks at more than just the skill set. Mgr-3 also looks for your personality to see how you're going to blend in with everyone else." and FGM-6's comment, "Overall, I think it was very positive, and the leadership was very responsive in support of us." are just a few examples of where focus group comments linked back to the main themes. As shown in Table 5, the top three themes that came out of the focus group were the importance of (a) job specialization and skills, (b) personality traits and work ethics, and (c) how team leadership impacted the team's performance.

When I analyzed the data collected from the focus group discussion, I had to pay close attention to my notes. While the focus group was very vocal, there was also a significant amount of body language used by the focus group members. As one focus group member answered a question, other members would nod or wave the hands and arms in agreement. Approximately a third of the repetitive occurrences coming from the focus group fell into the category of body language.

As shown in Table 5, I found ten discrete references relating to job skills and specializations. When I include repetitive occurrences, there were 56 total references by the focus group members to job skills and specializations. This abundance of references to their work experience and skills provided support to the fact that the participants were seeking only individuals whom they believed were the best fit for specific positions on the team. Some of the focus group comments relating to skills and job specializations include: FGM-6 "I have 26 years' experience working here" and, "I worked with all the previous versions of the website. I kind of was responsible for the second version". FGM-4, "I think I brought a level of Personify experience," and, "I was in IT forever at various levels." FGM-1 stated, "As I said before, my having worked with the previous two versions of the website and the content and the way the website worked. Also, I think I'm a very quick learner." The above focus group member statements ties directly back to the theme of personality and work ethics.

Looking at Table 5 again, we see there were ten discrete references to personalities and work ethics made by the different members of the focus group. When I include repetitive references, there were 53 total occurrences where focus group members referenced the same personalities and work ethics the participants had stated. Seven of the ten comments made by the focus group were the exact same as the desired personalities the participants had stated they were seeking. Some examples of where the focus group comments were exact matches with the participant comments follow. First was FGM-1's comment, "I'm a person that's willing to share my knowledge." Then, FGM-4's statement, "Everybody is willing to share whatever," both of these statements

tie directly back to Mgr-1's statement "I try to think about how helpful they are going to be and how willing to share information." Another example is FGM-1's comment, "We work together as a group well" which links directly to MGR-3's statement concerning team members who "would be able to work together." The high number of direct correlations between participant statements and comments made by the focus group members provided strong support for the theme of personalities and work ethics.

The third theme to stand out from the focus group data was the importance of how the team's leadership influenced the team's performance. As I performed the analysis, I was careful to keep references to leadership divided between actions related to managers' selection strategies and a manager's daily leadership functions. I looked for references made by the focus group that correlated with the leadership factors I identified in the participant interview data. Since Mgr-3 was the project lead, the majority of the focus group's comments concerning leadership and management related to Mgr-3. Comments such as: FGM-4's comments, "Mgr-3 looks at more than just the skill set. Mgr-3 also looks for your personality to see how you're going to blend in with everyone else's." FGM-5 commented, "Mgr-3 is very open and that's also the way Mgr-3 works as well." And, FGM-1's comments:

Yeah. Mgr-3 is kind of the genius behind the whole new website design and developing the team that manages the website and the database because it's all combined. Mgr-3 is very good at thinking of things that need to be done and ways to do them but any time you have a suggestion about how to do something, Mgr-3

listens and will take it into consideration (personal communication, September 9, 2016).

As Table 5 shows, there were nine discrete comments relating to leadership, or 36 repetitive occurrences. Comments relating to the team's leadership seemed to infuse a type of synergy within the focus group.

Table 5

*Focus Group Theme Breakouts*

	Discrete Responses	Interview Questions	Total Responses*	Question Numbers
Personality	10	2, 3, 4, 6	53	2, 3, 4, 6
Job Specializ	10	1, 2, 3, 6	56	1, 2, 3, 4, 5, 6
Leadership	9	1, 2, 3, 4, 5, 6	36	1, 2, 3, 4, 5, 6

*Note.* \* Total responses include discrete answers plus repetitive occurrences of the discrete answers.

The focus group data supported three of the four themes identified in the participant interviews. It supported the themes of Personalities, Skills, and Leadership. While it did not support the participant's theme on Diversity, more importantly, it did not introduce any new, previously unidentified data. This is important in testing for data saturation. Since no new data was introduced, it helps to prove that data saturation was achieved via the three participant interviews.

After my analysis of the focus group discussion, I completed my review and analysis of the available organizational data. The documentation was somewhat limited in scope but did provide additional information, which collaborated the findings of the other data sources. The documentation available for review was a Website Development & Implementation Team Report (henceforth referred to simply as The Report). The project

management team developed it as a means for documenting what worked well, what did not work so well, and to provide some thoughts and directions for future projects.

Table 6, below, displays the results of the analysis of this document. I identified four key areas in the document. These four areas can be tied back to the four themes developed from the analysis of the interview data and supports the data obtained from the Focus Group discussion. The four areas identified in The Report were: personality and work ethics, job specializations and skills, diversity, and leadership. Management included comments within in the document that discussed how the selection criteria worked identifying and selecting the best individuals for the team. The use personalities and work ethics; and use of job skills and work experiences were all discussed as part of the selection strategies for implementing the team. According to The Report (2016), "The team felt that including individuals from a wide range of departments was one of the biggest keys to the success of the project" and that, "The team also agreed that having a mixed range of ages, genders, and perspectives in general was beneficial to the project." Based upon the preceding comments, diversity appears to have played a major role in the success of the project.

Management acknowledged that the project, although it was a huge success, was not without problems. According to The Report (2016), under the heading "What didn't work," management identified two problems. The first problem was, "The team found that the technology partner we used for the website did not provide sufficient training, and was not as responsive as they could have been." The second problem was:



Vacation schedules were also an issue as some of the development time fell in July and August. While the team covered for each other, they struggled at times due to the small size of the group and the fact that certain tasks were specialized. (The Report, September 9, 2016)

Some of the lessons led to suggestions for better planning and increased team member training in areas the team felt they had weaknesses. Although the project experienced a couple personnel situations such as when some key personnel were permitted to take vacations during critical periods, the team still pushed forward, compensating as necessary. The above comments not only identify problems, but also help demonstrate the resilience of both the management team and the team members. The comment also demonstrates that management had properly identified and selected employees who had the proper work ethics and skills (per their selection strategies) to see project tasks through to completion.

Management expressed how their ability to maintain clear and frequent communications with the team, reiterating the vision, goals, and directions helped maintain a positive work environment for the team. Right from the start, the management team worked hard at maintaining a positive atmosphere for the team. Management's plans for being cheerleaders, to empower the team to make certain decisions and to provide ongoing encouragement all helped to create a genuine, positive environment. In The Report (2016), management explained that:

The team liked the “safe place” mentality. Knowing that they could propose any idea without derision was important to everyone. Everyone also indicated that the

mostly democratic approach we adopted to handle key decisions worked well.

Everyone felt they had ownership in the process, and that their voices were heard

(The Report, September 9, 2016)

The above comments all link-back to the leadership styles the three participants demonstrated during the team selection and implementation process.

Table 6

*Organizational Documents: Project Summary/Lessons Learned*

	Discrete Occurrences	Total Occurrences
Personality	3	3
Job Special	6	6
Leadership	2	2
Diversity	2	2

*Note.* \* Total responses include discrete answers plus repetitive occurrences of the discrete answers.

The methodological triangulation of the information collected from multiple sources (the interviews, the focus group, and the organizational documentation) has provided me a rich, descriptive set of themes. The fact that my findings have been consistent across these multiple sources, and across different employee bases (managers and team members) with no new information identified, helps to validate my attainment of data saturation.

When I compared my findings with existing literature and research, I found consistency within both the bounds of my conceptual framework and current research. As noted previously, the foundation of this study consisted of three different theories. The three theories were (1) Werbel and Gilliland's 1999 theory of person-group fit, (2) the five-factor model (FFM) of personality (McCrae & John, 1992), and (3) Tuckman's 1964

theory of personality and group behaviors. A manager who fully understands these three theories should be able to use personality traits to identify and select personnel who would be good fits for a workgroup and expect the group to work together as an efficient, cohesive team, thereby increasing the performance of the team.

The findings of this study are consistent with current research. Gilal, Jaafar, Omar, Basri, and Din (2016) recently documented the use of personality traits for selecting programmers for software develop projects. Karimi, Baraani-Dastjerdi, Ghasem-Aghaee, and Wagner (2016) also found personality traits useful for identifying programmers best suited for software development projects. In the area of diversity, Valls, González-Romá, and Tomás (2016) recently reported findings that showed how team climate moderated team performance in diverse team situations. Their findings showed that when team climate was high, team performance was high; and when team climate was weak, team performance was low. Based upon the comments provided by the focus group, I do not believe the team climate could have been much higher for this team. They were clearly highly motivated and proud of their work and accomplishment.

### **Applications to Professional Practice**

In this single case study, I focused on identifying specific strategies that business managers used for implementing cross-functional project teams. Specifically, I was interested in exploring the strategies managers used to determine and pick individuals as members of their project teams. Researchers over the past four decades have identified numerous factors that can be used to improve both individual and team performance. Business managers who understand this research and apply it in the execution of their

jobs may create a significant advantage over managers who continue to lead and manage using outdated methods. Cheruvelil et al. (2014) and Leasure et al. (2013) noted in their studies, various reasons why teams are important and necessary in today's business environment. Businesses need to make use of the new technologies and tools that have been designed to work in this new business environment if they hope to remain competitive.

Using the findings of this study, I hope to provide business managers new insight on some of these tools that may help them to improve their strategies for selecting better team members and improving the performance and results of their project teams. The tools are free; they will not cost a business anything. The tools are not difficult to use, managers will just need to understand how to apply them to their situation. The tricky part for some managers will be acknowledging the need to change, that it is possible there is a better method than the old way of doing things.

The organization chosen for this single case study has a record of professionalism and success. This organization recently completed a major merger. As one would expect, the merger involved combining everything, employer databases, company websites, and so on. Recognition of the success of the project team goes beyond the organizational employees and management, as evident with the company winning first place in a national competition for business website designs.

As I stated above, to accomplish their goals, the team managers did not use any high tech gizmos, no fancy formulas, nor did they spend thousands of dollars hiring consultants or for team development seminars. The strategies used by this organization

focused on four factors. First, the team leaders must understand and recognize the importance of matching person - job fit (Tims, Derks, & Bakker, 2016). Second, team leaders must also understand and make use of individual personality traits to build a cohesive team. Applying the first two factors simultaneously we could consider them as using person - team fit (Seong, Kristof-Brown, Park, Hong, & Shin 2015). Third, the team leaders must understand diversity and how to apply it during team implementation. Fourth, the organization must have the right type of leader ready to implement and lead the project team.

These four factors when performed correctly should provide a cohesive team of highly trained or qualified individuals, coming from a diverse range of backgrounds which both complements and stimulates the team, under the leadership of a manager who can continuously motivate the team through positive feedback, and team member empowerment. The organization, which assisted with this single case study, applied these four factors in such a fashion, that they built from scratch their very own high-powered super team.

### **Implications for Social Change**

The findings of this study offer a diverse scope of factors that could positively influence social change. Higher levels of team performance could positively influence company profits and employee job satisfaction. Increased job satisfaction reduces employee turnover rates thereby saving the organization money. Through the proper application and management of diversity, employees have the opportunity to improve both their professional skills and their understanding of other cultures and religions. The

positive interactions created at work using this study's findings can easily work outside of the office. When employees share their positive work experiences relating to diversity with their family and friends, they are helping to increase social understanding of racial, cultural, and religious relations on a much larger scale.

Understanding people, their personalities, their likes and dislikes, what they are good at, and using this knowledge as a strategy for improving something is not just applicable to our professional lives. The strategies identified in this study can also influence our personal lives. Through different applications, the strategies from this study can provide various types of positive social change within our families and communities. As an example, Schänzel and Smith (2014) discuss the importance of maintaining diverse mindsets when planning a family vacation. By taking into account the diversity of genders, age, and the individual interests of the family members, Schänzel and Smith have shown how understanding diversity can maximize a family's holiday experience.

Creating positive social change as discussed above is more than just increasing the competitive advantage of an organization. The strategies identified in this study have the ability to create positive social change by influencing an individual's psychological capital (Paterson, Luthans, & Jeung, 2014), and improving work-life balance (Butts, Casper, & Yang, 2013; Jha & Malviya, 2015). A positive social change occurs whenever some form of positive change occurs within the business, the community, or even at home. The strategies I identified by this study have the potential to impact lives globally, both professionally and socially.

### **Recommendations for Action**

In the findings of this study, I identified three specific themes that management used to define desired team-fit characteristics. Organizational management developed their team-fit characteristics such that they could maximize specific factors within the team. Management wanted to create a highly qualified, results-driven, and cohesive team. The themes identified by this study that played directly into the team-fit characteristics were personality traits, skills or work experience, and diversity. There was also one emergent theme identified which played a significant role towards the success of the project. The emergent theme was leadership. The project's managers maintained a consistent leadership style, which acted as a moderator for the desired fit characteristics.

The following recommendations are provided for business managers and other individuals starting the process of planning a project. Other managers or individuals currently working through a project may also benefit from using these recommendations, but may not be able to obtain the same results as if they had used the recommendations from the start of their project. This information may also be of value to trainers conducting training on project management or similar topics.

My recommendations for applying the findings of this study within other businesses and activities are simple. First, organizational managers must be proactive in identifying the desired team-fit characteristics, that means fully evaluating the requirements of the project such that they can develop a comprehensive list of the types of personalities, work ethics, and skills necessary to have the best match of individuals to

each position on the team. Finding individuals with the right team-fit characteristics at the start can save both time and money having to correct problems later.

Second, do not blindly accept proposed team members based upon another individual's recommendation or offer. Perform the necessary research to verify each prospective team member meets and fulfills the necessary team-fit characteristics. Do not accept individuals because they are the most popular, the most senior, or in some cases the most experienced. Managers must stand their ground and select only the individuals who truly meet the team-fit requirements. Third, when evaluating employees, do not discriminate against individuals for any reason. Diversity, when properly managed, has been linked to increased creativity and performance, so embrace diversity, encourage it, promote it.

Last, but most important, team management must accept their roles and responsibility towards leading and supporting the team. Be the team's biggest cheerleader. Acknowledge both the team and individual members' work efforts and performance regularly and openly. Be consistent and sincere in your leadership. Earn the teams' trust and respect quickly by showing the team your willingness to resolve conflicts quickly and fairly. Managers should also be willing to pitch in to help the team as may be necessary from time to time. Last, permit team members to share in decision making to demonstrate your confidence and trust in them.

None of these items are new. Each of the above themes simply requires practice and a willingness to use. What may be new or unusual is applying them universally from the start of the project. The organization in this case study had tremendous results



following these guidelines. This process was not new or unusual to the management team. This process was their usual, day-to-day management style.

As noted in the Letter of Introduction and Invitation to Participate in this study, the participating organization and all participants will receive a courtesy copy of the finding for their personal use. I will publish this study in the ProQuest Dissertations and Theses Database for anyone to review and use as they may wish. I plan to publish the study in various business journals where different types of business managers will have access to the information.

### **Recommendations for Further Research**

The first area to consider for further research should be related to any limitations identified within the proposal of this study. Limitations are factors that a researcher cannot control which may limit the scope and quality of a study (Moustakas, 1994). The main limitation identified by this study was the possibility of organizational requirements or policies that limited or restricted the manner in which managers were able to implement cross-functional teams. Company specific requirements such as these could negatively influence or limit a business manager's strategies for team implementation. Fortunately, I found no such policies or guidelines of this type.

The first area I would encourage further research would be a comparison of the use of team building workshops (or similar events) against the strategy of implementing teams using the theory of team-fit. As discussed in the presentation of findings and further discussed in the recommendations for actions, one of the key success factors was that the managers used their strategies for starting with the best team composition they

could identify. Starting with high-quality teams saved the company both time and money by avoiding the common strategy of simply tossing together a team and then pushing them through multiple days of weeks of team building training and workshops. A study comparing these two strategies could help validate the findings of this study by demonstrating the positive benefits and cost savings associated with starting with the right team, vice trying to mold and shape an unmatched group of individuals.

The second area for further research could be to study the impact of different leadership styles used with the three primary themes and implementation strategy identified by this study. The reason for this study is simple - as managers and leaders, we all tend to have a level of bias regarding our leadership styles. A study, in which one or more managers sequentially lead different teams varying only their leadership styles with each team, could provide valuable evidence and insight into the effectiveness of each leadership style.

A third and final area for further research could be to study an organization that is larger or more geographically dispersed, where managers do not personally know the majority of the employees and other managers. Use the same themes and strategies identified within this study, but force the managers to use different research and evaluation tools for determining their employee's match for the desired team-fit characteristics. Can the researcher achieve similar results when managers use different personality and performance measurement instruments/methods?

All three of these research topics could help to validate and expand the knowledge from the current study. All three of the suggested studies could help to validate findings

of other related studies within the literature, while providing business managers with additional information and knowledge that could help them implement stronger, more cohesive teams. The knowledge obtained from this type of research is easily applied to real world application, does not require the purchase of hardware or software, and is, therefore, available to any and all businesses looking for ways to develop competitive advantages.

### **Reflections**

I have a long history of working in business and technology. Over the years, I worked my way up from the lowest organizational levels as an electronics, radar, and computer technician, into the middle and upper management functioning as a departmental director. I have worked on numerous types of teams at various levels as a team member, a team leader, and the team/project manager. Through all of this, I have worked with a diverse range of managers, both good and bad. Naturally, I have developed a few biases and personal opinions about what makes a good team and a good manager/leader.

When I decided to pursue my doctoral study, I had several ideas for a topic based on the use of business teams. My choice ultimately became a study on how a manager's strategy for implementing a team influenced the team's outcome. I did have concerns however about my prior experiences influencing my ability to perform the study with an open, unbiased mind.

As I progressed through my course work and the study, I used several factors to ensure I remained as open to the data collection process as possible. To further recognize

and control my biases, I performed a bracketing interview with my program chair. The bracketing interview helped me to understand my biases and to recognize when my biases were influencing my judgment. The bracketing interview helped me to understand how to set my biases aside during data collection and analysis processes.

I also maintained a reflective journal where I made notes on specific concerns about different aspects of my personal experiences. During my program of study, there were times when I had doubts about my understanding of specific processes. These periods of doubt coupled with moments of arrogance, where I found myself already having all the answers, were both factors that I knew I had to face and learn to control. My solution for dealing with these periods was to write about them in my journal. Writing about these biases helped me to work my way through the moment. As I recorded my thoughts, I would try to develop a plan that would help me to properly prepare myself for that specific event. By clarifying my plan of action for this event, I restored my confidence and better prepared myself for the actual event.

Before starting the different tasks, and at various times as I worked through the events, I would read the notes in the journal. Doing this helped to refresh in my mind, my plan as to how I would work through the different tasks. Reading my notes from my journal was a way to refresh my understanding of my biases, and how I needed to keep them separate from the task, to strive to be open-minded, and non-judgmental. In many ways, my journal became the little figure of self-consciousness sitting on my shoulder, whispering in my ear what was right and what was wrong.

By developing my ability to control my biases, I found that I have been able to see things clearer, through different lenses, from different perspectives. Through the control of my biases, I have become less judgmental, and more importantly, I can better focus on understanding the events or the information as it occurs. By the end of my study, I realized there was a lot I had not known concerning managing teams, but there was also a lot I had known but lacked a solid foundation for understanding why these items were true. One of the biggest things I learned was that seeing with opened eyes and truly listening to what is said can bring clarity and depth to understanding, whereas biases and preconceptions may easily result in confusion and misconceptions.

### **Conclusion**

Through this study, I wanted to develop an understanding of the strategies managers were using to identify and select individuals for inclusion on their project teams. The primary data collected for this study came from participants who were responsible for selecting and managing project teams at a mid-sized nonprofit organization. Additional data came from a focus group comprised of several team members and a review of organizational documentation relating to project team results.

The themes identified in the Presentation of Findings showed that the management team had three primary strategies for selecting team members. The first strategy was to identify individuals who possessed specific personalities and work ethics that promoted increased team performance. The second strategy was to identify those individuals who had the requisite skills and experience necessary to complete all tasks associated with merging the two organizations. The third strategy was to take advantage

of various types of diversity to ensure the final product applied to all members of the organization, as well as the diverse customers base served by the organization. The emergent theme of leadership was not so much a consciously planned strategy as it was a subconscious strategy or simply a method of leadership. Meaning that had the management team demonstrated a less effective leadership style (i.e., had they been less proactive in their planning), it is doubtful the team would have achieved the level of success it reached. This theme became evident as I compared the primary data collected from the participating managers with the data collected from the focus group.

Management's application of these four themes proved to be the formula for a highly successful project. By applying these themes at the very beginning of the project, the management team was able to avoid the team building events many project teams require in order to aid them in becoming a cohesive team. The application of the four themes during the team implementation process helped to ensure the team members were all team players, with solid work ethics, and that the team members had the diversity to meet all the requirements of the project.

As current literature documents, business teams continue to report high failure rates. The literature documents many reasons as the cause for these failures - poor communications, poor planning, poor management, lack of funding, or other resources, and the list goes on. All of these items are the responsibility of an individual. This *individual* is the key commonality between all functional business teams. As a troubleshooter conducting root-cause failure, I would classify the individual team member as the root-cause. The truth is all these causes are nothing more than symptoms

created by one or more individual(s) failing to perform they assigned task or responsibility.

The project management team for this nonprofit organization was proactive in identifying the team-fit characteristics they felt were necessary to put together a strong, cohesive team. The management team stayed actively involved throughout the project, assisting the team when necessary, cheering the team along creating a positive team environment, sharing decision making, and providing both individual and team recognition for accomplishments. As noted by the focus group, "Management made it happen!"

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## Appendix A: Participant (Manager's) Interview Guide / Protocol

Participant Name: \_\_\_\_\_

Date: \_\_\_\_\_

Positional Title: \_\_\_\_\_

# of Teams Managed: \_\_\_\_\_ Avg Size of Teams: \_\_\_\_\_

Types of Teams: Work/Project/Virtual/X-functional/Other

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Hello, my name is *Robert Stewart*. I am a Doctoral Student with *Walden University*.

I am conducting *voluntary* semistructured interviews of individuals who have experienced the phenomena of being *responsible for identifying and selecting individuals* to serve as team-members on various business projects or work teams. My goal is to develop an understanding of the current business practices and tools used for selecting individuals for assignment to business teams. This Interview is designed to last approximately 45 minutes, 60 minutes at the very longest. I will record the interviews for accurate transcription and analysis. Please note the following: Everything we discuss is completely confidential. Nothing will link you personally to this interview, or my doctoral study.

At this point, I would like to verify the following:

- Are you willing to participate in this study and answer my questions? Y / N
- Do you have any questions before we begin? Y / N

If you are ready to begin, I will start the recorder and we will begin:

The central research question for this study is: What strategies do business

managers use to determine team fit when selecting employees for assignment to cross-functional project teams?

To ensure participant answers fully describe the details of their lived experience, the following set of interview questions are available if necessary:

#### Interview Questions

To gain a detailed contextual description of each participant's experience, the following interview questions will support the research question.

1. What strategies did you use for forming the cross-functional team?
2. What types of characteristics did you identify as desirable team fit characteristics for the team?
3. What process did you use to assess these characteristics in individuals you considered for selection to the team?
4. What personality characteristics as a unit did the team display?
5. What types of diversity factors did you consider during the selection process?
6. What types of assessment tools did you use during the selection process?
7. What factor(s) contributed most to the cohesion of the team?
8. What resource proved most useful during team selection and implementation?
9. What was the overall performance level of the team?
10. To summarize, what was your overall impression of what made the team successful?

This completes the interview. Do you have anything else you would like to say or add before I stop the recorder? Thank you very much for your time and participation in my doctoral study.

Stop the Recorder

## Appendix D: Letter of Introduction to Business

Company Name

Address

Sir/Ms:

As a follow-up to our telephone conversation, I am sending you this letter of introduction.

My name is Robert Stewart. As I explained in our telephone conversation, I am a doctoral candidate at Walden University, and I am asking for your support and cooperation in completing my doctoral study. My doctoral study will explore the strategies business managers use for the selection and assignment of personnel to cross-functional business / project teams. The support and assistance I request falls into the following four areas:

1. Permission to conduct face-to-face interviews with three different managers who have personally experienced the process of identifying and selecting individuals for assignment to cross-functional business / project teams. Time requirements for the managers will be 45 - 60 minutes for the face-to-face interview; and a follow-up 45 - 60 minute member-checking period for the managers to review initial data findings for accuracy, and to make suggestions for corrections or additional comments as may be necessary.
2. To conduct a focus group discussion of six employees who have been assigned to and worked on a cross-functional business / project team. Total time for this group discussion will be 60 - 90 minutes.

3. I request permission to review copies of non-proprietary organizational policy documents that relate to the formation and use of cross-functional business / project teams; and archival team status reports, lessons learned reports, or other documentation that may shed light on the process of evaluating employees for team-fit and assignment to teams. This data is not to exceed 3 years worth of data files. Total time for this would depend on the individual and the amount of documentation they are able to locate relating to the research topic.

4. For the interviews and focus group discussion, I intend to schedule the meetings in a neutral location with the employees. Thus I may or may not need to request on-site space for these events. If this is not feasible, I will request assistance in identifying possible locations within your local vicinity for conducting these events.

Your cooperation in completing this study could result in identifying findings that improve team performance across a wide spectrum of applications. If you desire additional information to aid in your decision process, you may reach me via telephone at....., or via email at [robert.stewart@waldenu.edu](mailto:robert.stewart@waldenu.edu).

Thank you for your support.

Robert Stewart  
Doctor of Business Administration (DBA) Candidate  
Walden University

.....  
[Robert.Stewart@waldenu.edu](mailto:Robert.Stewart@waldenu.edu)

### Appendix E: Focus Group Guide / Protocol

Hello, my name is *Robert Stewart*. I am a Doctoral Student with *Walden University*.

I am conducting a *voluntary* focus group of several individuals who have experienced the phenomena of being selected and assigned to serve as team-members on some type of cross-functional project or work teams. My goal is to develop an understanding of the current business practices and tools used for selecting individuals for assignment to business teams. This focus group is designed to last approximately 90 minutes. I will record the discussion of the focus group for accurate transcription and analysis. Please note the following: Everything we discuss is completely confidential. Nothing will link you personally to this focus group, or my doctoral study.

At this point, I would like to verify the following:

- Are you willing to participate in this study and answer my questions? Y / N
- Do you have any questions before we begin? Y / N

If you are ready to begin, I will start the recorder and we will begin:

The central research question for this study is: What personnel strategies do business managers use to select employees for team fit and assignment to cross-functional project teams?

To ensure participant answers fully describe the details of their lived experience, the following set of interview questions are available if necessary:

### Focus Group Questions

To gain a detailed contextual description of your experiences, the following interview questions will support the research question.

1. What was your reaction to being assigned to a cross-functional project team?

(Clarify: Were you happy or upset? Why?)

2. How did your personality fit in with the team's overall personality?

3. How did you add value to the team?

4. How would you classify the functionality of the cross-functional team?

(Role assignments? Responsibility & Authority? Other?)

5. During your assignment to the cross-functional team, what was your biggest frustration? Why?

6. What additional information would you like to share about your cross-functional team experience?

This completes the focus group. Do you have anything else you would like to say or add before I stop the recorder? Thank you very much for your time and participation in my doctoral study.

Stop the Recorder



## Appendix G: Sample letter of Cooperation

Community Research Partner Name

Contact Information

Date

Dear Researcher Name,

Based on my review of your research proposal, I give permission for you to conduct the study entitled *Team Member Selection Strategies* within the (*Insert Name of Community Partner*). As part of this study, I authorize you to recruit managers (for face-to-face interviews and subsequent member checking) and individuals for participation in a focus group discussion. You are also authorized to review non-proprietary policy documents and team reports that relate to the study topic of member selection strategies and team performance. Individual participation will be voluntary and at their own discretion.

We understand that our organization's responsibilities include: permitting access to non-restricted areas, the use of recording equipment during the interviews and focus group discussion, providing copies of applicable archival documents, and the use of

meeting/conference rooms for the afore mentioned interviews and discussion group. We reserve the right to withdraw from the study at any time if our circumstances change.

**(Include the following statement only if the Partner Site has its own IRB or other ethics/research approval process:** The student will be responsible for complying with our site's research policies and requirements, including Describe requirements.)

I confirm that I am authorized to approve research in this setting and that this plan complies with the organization's policies.

I understand that the data collected will remain entirely confidential and may not be provided to anyone outside of the student's supervising faculty/staff without permission from the Walden University IRB.

Sincerely,

Authorization Official

(Contact Information)

Walden University policy on electronic signatures: An electronic signature is just as valid as a written signature as long as both parties have agreed to conduct the transaction electronically. Electronic signatures are regulated by the Uniform Electronic Transactions Act. Electronic signatures are only valid when the signer is either (a) the sender of the email, or (b) copied on the email containing the signed document. Legally an "electronic signature" can be the person's typed name, their email address, or any other identifying marker. Walden University staff verify any electronic signatures that do not originate from a password-protected source (i.e., an email address officially on file with Walden).

## Appendix H: Invitation Letter/Email for Managers

Date:

(Perspective Participant's Name)

Subj: Letter of Invitation to Participate

Dear \_\_\_\_\_,

My name is Robert Stewart. I am a doctoral candidate in the School of Business and Management at Walden University. I am conducting a research study as part of the requirements of my doctor of business administration degree. I would like to invite you to participate in this study. I am researching the types of strategies business managers use to identify and select members (to determine team fit) for cross-functional and project management teams.

If you decide to participate, you will be asked to meet with me for a face-to-face interview to discuss the strategies that you as a manager have used for identifying and selecting members for the teams you have implemented and lead. In particular, you will be asked questions on topics such as explaining the strategies you find most useful, and how items such as: personalities and assessments, diversity, and team cohesion, have influenced your strategies. The meeting will take place at a mutually agreed upon time and location. It should last approximately 45 - 60 minutes. I will record the interview so

that I can accurately transcribe and reflect on what is discussed. A secondary follow-up meeting will be scheduled to give you the opportunity to conduct a member-check (review) of the initial data findings for accuracy and/or addition of any new information you may feel is appropriate.

You may feel uncomfortable answering some of the questions. However, you do not have to answer any questions that you do not wish to. Although you may not benefit directly from participating in this study, we hope that others in the business community will benefit through increased knowledge and strategies relating to team fit. The outcome of this study may improve overall team performance and efficiency, resulting in increased profits and competitive advantages.

Participation is confidential. The results of the study may be published or presented at professional meetings, but your identity will not be revealed. Participation is anonymous, which means that no one other than myself will know what your answers are. If you accept this invitation to participate, you will be assigned a unique identification code that will be used on all materials and data in place of your true identify. As the researcher and data analyst, I will be the only individual to listen to and review the recording for transcription and analyze purposes. After completion of the study, all materials and data files will be maintained in a lock security container for the required 5 years, after which time everything will then be destroyed.

This is an unfunded research study. Although I do not plan for or anticipate there should be any costs associated with your participation in this study, if some kind of costs should occur, it would be your responsibility to cover. Taking part in the study is your

decision. You do not have to be in this study if you do not want to. You may also quit the study at any time or decide not to answer any question you are not comfortable answering.

I will be happy to answer any questions you have about the study. You may contact me by telephone at ..... or via email at robert.stewart@waldenu.edu; or via my faculty chair, Dr. Dorothy Hanson at ..... (PST), or via email at Dorothy.Hanson@waldenu.edu should you have study related questions or problems. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is 612-312-1210.

Thank you for your consideration. If you would like to participate, please sign the attached consent form and return it to me, either via regular mail or as a scanned email attachment. I will call you within the next week to see whether you are willing to participate.

With kind regards,

Robert Stewart

.....

.....

.....

robert.stewart@waldenu.edu

### Appendix I: Invitation Letter/Email for Focus Group Members

Date:

Subj: Letter of Invitation to Participate

Dear \_\_\_\_\_,

My name is Robert Stewart. I am a doctoral candidate in the School of Business and Management at Walden University. I am conducting a research study as part of the requirements of my doctor of business administration degree. I would like to invite you to participate in a focus group discussion as part of my study. I am researching the strategies business managers use to identify and select members (to determine team fit) for cross-functional and project management teams.

If you decide to participate, you will be asked to answer and discuss (as part of a focus group) questions relating to your experience being assigned to and serving as a member of a cross-functional team. In particular, you will be asked questions on topics such as: how personalities, diversity, and cohesion influenced the performance of the team. The focus group discussion will take place at a mutually agreed upon time and location. It should last approximately 60 – 90 minutes. I will record the discussion so that I can accurately transcribe and reflect on what is discussed. This is all there is to do should you agree to participate in the study.

During the course of the focus group discussion, you may feel uncomfortable answering some of the questions. However, you do not have to answer any questions that you do not wish to. Although you may not benefit directly from participating in this

study, we hope that others in the business community will benefit through increased knowledge and strategies relating to team fit. The outcome of this study may improve overall team performance and efficiency, resulting in increased profits and competitive advantages for businesses.

Participation is confidential. The results of the study may be published or presented at professional meetings, but your identity will not be revealed. Participation is anonymous, which means that no one other than myself and the other focus group members will know your answers or what was discussed. If you accept this invitation to participate, you will be assigned a unique identification code that will be used on all materials and data in place of your true identify. As the researcher and data analyst, I will be the only individual to listen to and review the recording for transcription and analyze purposes. After completion of the study, all materials and data files will be maintained in a lock security container for the required 5 years, after which time everything will then be destroyed.

This is an unfunded research study. Although I do not plan for or anticipate there should be any cost associated with your participation in this study, if some kind of costs should occur, it would be your responsibility to cover. Taking part in the study is your decision. If you decide to participate, should you desire, you may quit the study at any time or decide not to answer any question you are not comfortable answering.

I will be happy to answer any questions you have about the study. You may contact me by telephone at ..... or via email at robert.stewart@waldenu.edu; or via my faculty chair, Dr. Dorothy Hanson at.....(PST), or via email at

Dorothy.Hanson@waldenu.edu should you have study related questions or problems. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is 612-312-1210.

Thank you for your consideration. If you would like to participate, please sign the attached consent form and return it to me, either via regular mail or as a scanned email attachment. I will call you within the next week to see whether you are willing to participate.

With kind regards,

Robert Stewart

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robert.stewart@waldenu.edu