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Resources Available to Managers to Manage Employees through Mergers

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Walden University
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Abstract

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Jacqueline A. Bursey

MBA, Columbia Southern University, 2014

BSESH, University of Findlay, 2013

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

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Abstract

The failure rate of mergers is high, with the greatest effects being felt by the employees. Company mergers result in managers burdened with extra responsibilities that often result in poor people integration management of employees. A gap in literature exists regarding people integration resources available to managers during mergers. The purpose of this phenomenological, descriptive study was to explore resources managers perceive to have available to assist with managing employees through a merger. Greenleaf's servant leadership and Herzberg's 2 factor theories were used as the study's conceptual foundation. The research questions explored managers' perceptions of the range of resources available to assist with managing employees during a merger. The snowball sampling method was used to select a sample of 14 participants for individual semi structured interviews. The target population was managers who directly managed employees during a merger while working for a North American company. The qualitative data were collected, coded, and then analyzed for themes. The key findings were that while managers perceived they were not provided resources, managers' personal experiences along with resources such as human resource personnel and other managers' expertise were used as great resources. Open communication and information exchange were critical between the manager and the employees during the merger. Managers should focus on their soft skills when they engage with the employees. Implications for positive social change include employee satisfaction and engagement, employee retention, customer satisfaction, along with business growth and development in the global market.

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Dedication

This dissertation is dedicated to my two daughters and my seven beautiful grandchildren. My education journey took me away, many times, from spending quality time with all of them. No matter what was happening my family understood the dedication and commitment what was needed to give it my all. Having their support maintained my motivation to finish the journey. I would also like to dedicate this dissertation to my parents who were let down when I left school at seventeen to start a family. Today, they continue to support my educational dreams and career choices. Thank you, Chrystal and Cheryl, for supporting my drive to be a better provider throughout your growing years. Thank you, Kaitlyn, Zachary, Melissa, Alicia, Greysen, Ashtyn and Nixin for allowing me to sit with my computer on my lap finishing projects, while watching a movie together. Thank you, mom and dad, for not giving up hope on my ability to finish my education.

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Lastly, I would like to thank my doctoral study buddies, the “Fuzzy socks and Wine Club”. The encouragement, love and support from this group through the constant text, weekly calls and emergency call outs when one of us was lost and needed guidance. I will forever cherish the once residency acquaintances that turned into lifetime friendships.

This journey has been a great experience for me. Furthering my education was once a dream but through the support, love and personal motivation, I was able to make this dream a reality.

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Chapter 1: Introduction to the Study

Business mergers or acquisitions are happening more frequently because of how the technological advancements have opened the doors to the global market (Tavor, 2013). Technology has advanced to allow companies to join the global playing field for supply, employee, and customer resources. The global market is putting a greater strain on corporations to stay competitive and remain solvent. According to Tavor (2013), technological advancement has become the center of many economic activities, resulting in mergers and acquisitions. Through mergers and acquisitions, companies share resources and costs so they can remain globally competitive.

With the ability to globally resource employees, companies are seeing a greater employee turnover rate. Employees have the ability to work for corporations across the globe, therefore opening up their opportunities for personal choices and advancements without leaving their country. Losing employees is a continuous cost to corporations (Campbell & Alleyne, 2002). Mergers and acquisitions are also increasing the cost to companies because employees often feel lost during a merger or acquisition, which results in a high employee turnover rate. While managers are responsible for managing the employees' day-to-day activities, they are also often assigned the task of working the merger/acquisition details. This places increased stress on the managers, often leading them to ignore employee concerns. While there are many studies on mergers and their effects on employees, there are very few studies focused on understanding what resources are available to managers to help them effectively manage employees through mergers.

In this study, I focused on understanding what resources are available to managers to help the employees through the merger integration.

The general topic of the study was the effective resources that can help managers successfully retain employees through the merger process. In this chapter, I discuss the study's background, present the problem statement, purpose statement, and research questions. Next, I discuss the conceptual framework, and the nature of the study. I summarize the chapter with the definitions, assumptions, scope and delimitations, limitations, the significance of the study, the implications for social change and the chapter summary.

Background of the Study

Mergers take a toll on all levels of an organization. Hinescu (2014) noted that the effects of mergers go beyond the stakeholders, creditors, and third parties. Managers and employees are affected directly by a merger announcement. Rafferty (2007) discussed how employees of acquired companies often have both positive and negative reactions because they do not know what role they will play in the new organization. There are many changes happening throughout a merger process, and employees can feel lost in the mix. Taylor, Austin, and Caputo (1992) found that employees feel a loss of family atmosphere once a merger is announced. Other losses can range from personal freedom, communication within the company, and the availability of the managers. Komornicka (2015) found that many employees also lose health, medical, and pension benefits once a merger is announced.

Hinescu (2014) noted that there are both legal and psychological impacts of mergers on employees. Merger announcements often cause extra stress as employees' fear of job loss increases (Hinescu, 2014; Giessner, Ullrich, & van Dick, 2011; van Dick, Ullrich, & Tissington, 2006). Merger announcements come as a surprise for most employees, resulting in uncertainty about their future. The employees are unsure about how they will fit within the new organization, the future of their job, and the future of the organization that once was family to them. Hinescu explained that employees' rights need to be understood and explained to them to help with the merger process.

Podgorski and Sherwood (2015) and Giessner, Ullrich, and van Dick (2011) discussed the roles of human resources and organizational development departments in helping reduce the impact on employees during a merger. Human resources departments play a key role during times of change and can help organizations through a merger by providing help with "(a) target identification and strategy formulation, (b) due diligence, (c) integration planning, (d) integration implementation and management, (e) integration evaluation" (Podgorski & Sherwood, 2015, p.45). Giessner, Ullrich, and van Dick found that employees' well-being is one of the areas of least concern during the merger. Employees often deal with pre- and post-merger organizations (Giessner, Ullrich, and van Dick, 2011). Pre-merger organizations view the merging company as enemies creating conflict, competition, and discrimination (Buono & Bowditch, 1990; Giessner, 2009; Haunschild, Moreland, & Murell, 1994; Terry, 2001). Post-merger has employees comparing themselves to those in the other company (Giessner, Ullrich, and van Dick, 2011).

Managers continue to manage the employees through the merger; however, they are often busy trying to understand the merger and what is expected of them. Marks and Mirvis (2001) stated that three out of four mergers fail to achieve their strategic objectives once a merger is announced. According to Rafferty (2007), mid-managers feel caught between the expectations of their managers and the employees reporting to them.

Managers are responsible for ensuring the employees are retained while the merger is taking place. According to Zhang et al. (2015), managing employee talent is one of the core issues during a merger process. In their discussion of Greenleaf's servant leadership theory, Parris and Peachey (2013) contended that servant leadership is not just a management style but the way of life. A manager needs to have the skills and tools to manage the employees through a merger. According to Kelly, Cook, and Spitzer (1999), failure rates of mergers are fairly high, and successful mergers include active manager involvement. It is also important the managers have soft skills to resolving cultural issues, ensure effective communication, and look after the people.

Over the course of my literature review, I found a wide variety of factors that result from a merger announcement. Many researchers have discussed the effects of mergers on employees, and others have discussed how managers can help with the success of the merger. The gap in the literature is in the understanding of what resources are available to managers to help effectively manage the employees through mergers. This study was needed to identity available resources managers can use, once a merger is announced, to successfully retain employees through the merger process.

Problem Statement

The failure rate of mergers is between 30-80% (Kelly, Cook, & Spitzer, 1999; Marks & Mirvis, 2001), with the greatest effects being felt by the employees because the people integration is poorly managed (Podgorski, & Sherwood, 2015). One of the challenges, according to Komornicka (2015), is once the merger is announced, what happens to employees is not included in the focus of the merger. Hinescu (2014) found employees' morale decreases as a direct result of a merger announcement. Managers are given the responsibility of ensuring workers are managed throughout the merging of companies. The general problem is that when organizations go through mergers, the managers lack the knowledge and resources to manage employees through the merger integration. The specific problem is that the scope of resources available to managers to help them manage employees through the merger process is unknown. There is a lack of studies on the resources available to assist managers with managing employees during mergers resulting in a critical gap in management literature.

Purpose of the Study

The purpose of this phenomenological descriptive study was to understand the resources available to managers to manage employees during mergers. Mergers take place between companies on a regular basis. While a merger can be planned between managers, there are often many aspects of a merger which go unnoticed. During mergers, managers are not only responsible for ensuring that business performance, motivation, and job satisfaction go on as usual, but also that the well-being of their employees does not go unnoticed, which is often an area of less concern for upper management (Giessner, Ullrich, & van Dick, 2011). For this study, I defined management resources as programs, training, manpower, departmental support, and communication methods.

Research Questions

For this study, I developed one central research question with several sub-questions. The primary research question was: What is the scope of resources available from a manager's perception, to manage employees through a merger? I conducted interviews using open-ended questions for 14 managers of previously merged companies. To achieve a deeper understanding of the phenomenon under study, I developed the following additional research questions:

1. What type of special resources or skills were you provided to help manage the employees through a merger? How did you utilize the resources?
2. Explain any events or situations that might have occurred resulting in you utilizing the resources or skills to improve the situation? What effects did it have on the employees?
3. What were the benefits for the employees when a manager was provided resources/skills to manage employees through a merger? What are the benefits for the managers? What are the benefits for the organization?

Conceptual Framework

For this study's conceptual framework, I combined elements from Greenleaf's servant leadership theory (1977) and Herzberg's two factor theory (1968). Greenleaf introduced servant leadership after years of studying the roles of leaders and their relationships within organizations. Greenleaf's theory is based on the premise that the role of leaders in organization is to lead and demonstrate their complete commitment to serving others (Greenleaf, 1977; Parris & Peachey, 2013). As the name indicates, Herzberg's (1968) two factor theory involves two factors: motivation and hygiene. These are intrinsic (motivation) and extrinsic (hygiene) factors that contribute to employees' job satisfaction or dissatisfaction. The factors that contribute to how employees feel about their jobs include company policies, relationships, manager's supervision, employee achievement, recognition, employee growth, and responsibility (Herzberg, 1968).

Employees enter organizations with their education and previous experience. Employees want to be successful and eventually gain enough knowledge to advance within an organization. They rely heavily on their managers to manage and guide them to succeed in meeting the company's goals and achieving personal growth. Personal achievement is high on employees' agendas when entering organizations. Employees can fulfill personal achievement by feeling rewarded for work, having their needs met, feeling valued, and feeling like part of a team. If the employees feel their needs are met, they are more likely to have job satisfaction and feel valued. This may lead to employees maintaining performance and remaining productive, supporting the need for employee's needs to be met in order for them to give back to a company.

Managers play a large role in the success of their employees. Managers are responsible for setting goals and implementing development plans for their employees. Interaction and communication with employees on a regular basis helps to build a trusting relationship. According to Greenleaf (1977), a trusting relationship is needed between leaders and employees in order to have positive employee responses. Employees rely on managers to help succeed by having the managers put their needs first. According to Greenleaf (1977), employees see leaders as servants first.

Herzberg's (1968) two factor theory holds that there are two factors that contribute to employees' job satisfaction: motivation and hygiene. These are intrinsic (motivation) and extrinsic (hygiene) factors that contribute to employees having job satisfaction or dissatisfaction. The motivators that contribute to the employees having job satisfaction include employee achievement, recognition, employee growth, and responsibility (Herzberg, 1968). The hygiene factors that result in job dissatisfaction are company policies, working conditions, working relationships, and manager's supervision (Herzberg, 1968). This theory is useful for understanding the importance of managers' supervision for employees' job satisfaction or dissatisfaction Employees are exposed to many company policies, procedures, and challenges that can contribute to employee's job satisfaction or dissatisfaction. When employees do not have job satisfaction, they will eventually seek other sources of employment. Herzberg's two factor theory stresses the importance of both factors—motivation and hygiene. Managers have an impact on how both factors affect the employees.

Employees are exposed to many company policies and procedures, including challenges that can contribute to employee's job satisfaction. When employees do not have job satisfaction, they will eventually seek other sources of employment. Herzberg's two factor theory stresses the importance of both factors motivation and hygiene. Managers have an impact on how both factors affect the employees.

Managers who recognize the importance of both factors for employee development can maintain job satisfaction and security for employees through a change. Mergers create an atmosphere of uncertainty. Herzberg's two factor theory and Greenleaf's servant leadership theory become more important in times of change. The employees heavily rely on their managers to help guide them through the merger process and to give them needed information. The employees want to know their managers are looking out for their best interest. According to Greenleaf (1977), employees will not respond to all people in authority; rather, they respond to the leaders or managers who have earned their trust. Greenleaf's servant leadership and Herzberg's two factor theory support my study to understand the importance for managers to manage the employees through a merger process.

I chose Greenleaf's servant leadership and Herzberg's two factor theories as the foundation for this study because when mergers are announced, employees rely on their managers for regular communication and guidance. Managers have the responsibility for managing the employees through the merger process. Herzberg's two factor theory supports the importance of the role of a manager and their management style during a merger. The employees rely on the managers to guide them through the process and help them be successful. Employees who do not trust their managers will have a challenging time once a merger is announced. Many factors can affect how a manager manages the employees through the merger process.

In Chapter 2, I offer a more detailed explanation of other studies that have used Greenleaf's servant leadership and Herzberg's theory to compare management styles and factors that affect employees once a change is announced. In this study, I focused on what resources are available to managers to manage employees during a merger. The study was concentrated on answering the three supporting research questions that will ultimately answer the overall central question for the study: What is the scope of resources available from a manager's perceptions to manage employees through a merger? Interviews were conducted using the developed questions and analyzed through the QSR Nvivo 11 program uncover themes, or resources, that managers can utilize when managing employees through a merger process.

Nature of the Study

This qualitative research included gathering data from interviews. Qualitative research is focused on understanding some aspects of social life (McCusker & Gunaydin, 2015). My research questions were focused on obtaining a better understanding what resources are available to managers to help them manage employees through a merger. The questions helped me explore the resources used by managers to manage employees through mergers.

I used a phenomenological descriptive study design. Englander (2016) stated that using phenomenological research is best suited for understanding issues in human science. According to Sousa (2014), researchers conduct descriptive-based phenomenological studies to describe, understand, and clarify human experiences. In this study, I interviewed 14 manager participants who had lived through a merger and could share their experiences. A phenomenological study was appropriate for this study because I was interested in collecting data from the experiences of the participants (Smith, 2014).

I conducted the study by bracketing, analyzing, intuiting, and describing to produce an understanding of the phenomenon being researched (Colaizzi,1978; Giorgi, 1970; Swanson-Kauffman & Schonwald, 1988). This research required me to collect raw data, sort the information into significant patterns, and then summarize the data into themes. There are many companies going through mergers, therefore the phenomenological study I conduct can be conveyed as an overall manager's experience while working through mergers.

Definitions

This study contains seven terms. The terms included are found throughout the research study. I have provided the following definitions for clarity and ease of understanding.

Acquisition: When an organization legally and financially obtains another organization; (Rau & Stouraitis, 2011).

Corporate culture: The integral component of how organizations influence employee behaviors, employee performance, and organizational performance (George, Sleeth, & Siders, 1999; Kotter & Heskett, 1992).

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

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

Merger: For the purpose of this study, a merger and acquisition are interchangeable. Both activities involve company transactions where employees and managers will be involved in change. In a merger, two or more companies are combining (Aktas, De Bodt, & Roll, 2013).

Merger waves: "Industry-specific shocks will occasionally destabilize the existing market structure, and mergers and acquisitions will then be one of the main instruments through which a new equilibrium is achieved; often, a succession of mergers" (Andrade, Mitchell, & Stafford, 2001; Andrade & Stafford, 2004, Mitchell & Mulherin, 1996).

Phenomenology: "A framework that can be used to provide language and concepts about how to bridge differing worldviews" (Duckham & Schreiber, 2016, p.57).

Assumptions

I made three assumptions in this study. (a) interchangeability of terms, (b) managing/supervising people and (c) research participants. The first assumption was related to the definition and use of the words *merger* and *acquisition*. Both activities involve company transactions where employees and managers will be involved in change. Mergers combine companies, while in acquisitions one company acquires another. For the purpose of this study, I treated the two processes identically because they have largely the same effect on employees and managers. The second assumption involved managers and supervisors who I interviewed for the study. Since managers or supervisors both manage the employees through the merger process, I included both managers and supervisors as participants. For the purpose of this study, managers and supervisors were treated as having equal responsibilities of managing employees during the merger process. The third assumption was related to the research participants. The purpose of the study was to provide an understanding of resources available during merger integration. To achieve this goal, I assumed that participants understood the intent of the research and were truthful when answering the interview questions. Further, I assumed that the study participants had experienced direct management of employees through the merger process.

All three assumptions are necessary to consider when conducting this study. The assumptions focus on the concept supervisors and managers both manage the day to day interaction of activities of an employee. The employees will feel similar effects from a merger or acquisition of the company. Therefore, the study will consider both as equal when choosing participants for the interviews. It was also important to assume the participants interviewed for the study understood the purpose of the research and were truthful in answering the questions during the interview, to help contribute to the study.

Scope and Delimitations

The scope will identify what is to be considered within the study, and the delimitation is topics not considered as part of the study. The scope will include the personal experiences and perceptions of the study participants while managing employees through a merger.

Scope

The scope of this study included managers in organizations that had already gone through the merger process. Mergers have increased over the last few decades. Therefore, there were multiple organizations available from which to draw participants. Most mergers focus on the financial aspect for one or both companies (Marks & Mirvis, 2001), and the employees are often left out of the overall merger process. Managers are expected to continue business as usual; however, they are often left to manage employees who feel disconnected to the company. According to Hinescu (2014), employees experience many feelings during a merger. Managers want to manage their employees through a merger, but often do not have the skills or resources to ensure employees' needs are met. Companies have resources available to help managers manage employees through a merger; however, managers often do not know what resources are available. In this study, I focused on understanding the resources available to managers to manage employees during a merger.

Delimitations

I delimited the study to participants from North American based companies who had managed employees through the merger process. Mergers take place with all sizes of companies, and employees feel the effects no matter the size of their company. The study had three delimitations (a) demographic topics (b) managers and (c) attributes that are the results of merger integration. When recruiting participants, I did not consider several demographic characteristics including (a) ethnic background, (b) religious affiliation, (c) financial status, (d) sexual orientation, and (e) physical location because these topics would not add value to the results. Further, the manager participants were required to have been directly involved in managing or supporting employees while the merger process was taking place.

The third delimitation was the attributes that are affected during a merger process. These factors constituted the framework of the lived experiences of the managers through the merger process. I focused on their personal experiences of working with their employees once the merger was announced. Given these delimitations, my findings can be used by future managers working through mergers, and can be generalized for future studies on mergers.

Limitations

All studies have limitations. There were five limitations to this study associated with (a) sample size, (b) resources, (c) participants, (d) qualitative data analysis, and (e) researcher bias. The first limitation was that I used a sample of fewer than 20 participants. The second limitation was the resources available to participants. While there may be many resources available to managers to help them manage employees through a merger process, not all managers have access to all resources. Companies may provide managers with limited or no resources. Third, the participants I interviewed may have had access to limited resources to assist them in managing the employees through a merger. The fourth limitation was the qualitative data analysis. I used the QSR NVivo 11 program and an Excel spreadsheet, analyzed the information I entered into both systems, and identified themes as they appeared through the research. The fifth limitation was researcher bias, which is possible with all research. I have had experience with mergers; however, I did not discuss my experience with any of the study participants. It is important for a researcher to maintain an open mind and not let personal experience get in the way of the data collected. I addressed all limitations so that they did not interfere with the research study. The study results can be used by future researchers to expand on the merger issues that affect employees.

Significance of the Study

This study may help managers understand what resources are available to assist managers in managing employees through a merger. Managers can have a profound impact on employees' attitudes regarding their job performance and motivation while going through a company merger. This research may help future organizational leaders better understand what resources are available to managers to ensure the success of managing employees through a merger.

Insights on this topic could help future managers approaching a merger with information how to work with employees so employees can stay committed, motivated, and continue to maintain job performance through the merger process. Mergers are taking place on a regular basis; therefore, it is important for managers to have an understanding what resources are available to help them successfully manage employees through a merger. This study may increase managers' awareness of available resources and increase the rate of employee retention through a merger process.

Positive Social Change

The results of this study may contribute to positive social change for individuals, community and the society. Merger failures have multiple negative consequences (Himmelsbach & Saat, 2014) that may affect the stakeholders, managers, employees, and the families of these individuals (Angwin & Meadows, 2015). Understanding what resources are available will allow managers to be more effective in managing employees through a merger. The improvement of employee retention will assist with greater organizational stability by increasing employee job satisfaction and decreasing employee turnover. Lower turnover rates can help reduce the financial impacts on organizations by not having to hire and train new employees so often.

As a result of this study, the larger management community will have greater knowledge of how to contribute to the success of an organizational merger through improving employee management. Employees who feel their needs are met will continue to be loyal to their managers and contribute to the success of the merger. Happy employees contribute to the success of the organization by ensuring customers are satisfied and return for future service. Understanding the resources available to managers to manage employees through mergers can increase the knowledge in the community of merger success.

Resources are available to help managers manage their employees through the merger process; however, managers may not be fully aware of the availability of the resources. Understanding the available resources will allow the managers to manage their employees successfully through a merger and have a positive impact on the greater management, business, and consumer community.

Summary and Transition

Chapter 1 included a detailed introduction to this phenomenological descriptive study and included discussions of the (a) background, (b) problem statement, (c) purpose statement, (d) research questions, (e) conceptual framework, (f) nature of the study, (g) definitions, (h) assumptions, (i) scope and delimitations, (j) limitations, (k) significance of the study, and (l) implications for social change.

I reviewed the background to set the stage on merger history and the impacts on employees once a merger is announced. Managers are expected to manage employees through the merger with the resources the company provides to them. In my problem statement I identified that the scope of resources available to managers to help manage employees through a merger successfully is unknown. My focused purpose statement was to understand the resources available to management to manage employees during mergers through the phenomenological descriptive study. I identified resources as programs, training, manpower, departmental support, and communication methods.

My three core open-ended research questions were used to conduct the interviews with the selected participants. I outlined the conceptual framework of Greenleaf's Servant Leadership (1977) and Herzberg's two factor (1968) theories on which the study was based. I discussed the reasons why the phenomenological descriptive method was chosen to conduct the study, the number of participants that were interviewed for the study, in my nature of the study section. In my definitions section, I discussed common terms found through the study and the assumptions section identified three assumptions present while conducting the study.

The three assumptions were (a) interchangeable of terms, (b) managing/supervising people, and (c) research participants. In my scope and delimitations section I identified what is within the boundary of the study and the items that would not have an effect on the study. The three delimitations were (a) demographic topics, (b) managers, and (c) attributes as a result of a merger. The limitations were identified being present while conducting the study; (a) sample size, (b) resources, (c) managers, (d) qualitative data analysis, and (e) researcher bias. Through the significance of the study section I identified the value of the study to managers in managing employees through a merger and maintaining employee retention. The implications of social change apply to employees and the greater management, business and consumer communities.

In Chapter 2 I provide a comprehensive literature review with the focus on how past researchers have identified the effects of mergers on employees and organizations. The beginning of the chapter focuses on the following topics; definition of a merger, classifications of mergers, the history of mergers, why do mergers take place and the success and risks associated with mergers. The effects on the organization are further broken down into; Financial impacts, business development, the governance structure of management, decision making, production and goals, technology, training and retraining and system and management systems. I continue the chapter with a discussion on company culture and employee retention.

Once a merger is announced, the employees are affected in many different ways. In chapter 2 I discuss the following effects on employees when a merger is taking place at their place of work; commitment, trust, communication, attitudes and stress, engagement and motivation, morale, and performance and production. I then summarize by discussing the role of human resources when a merger is announced and the comparison of five management styles in managing employees through a transition. The five management styles being compared are; transformational leader, transactional leader, authentic leader, situational leader and servant leadership.

Chapter 2: Literature Review

All employees are affected by mergers and acquisitions to some degree. Employee morale decreases as a direct result of the announcement of a merger (Hinescu, 2014). According to Komornicka (2015), once an organization announces a merger, employees and their benefits tend to be pushed out of focus. Kelly, Cook, and Spitzer (1999), and Marks and Mirvis (2001) have found that the failure rate of mergers range from 30%-80%. Unfortunately, poor management of the personnel integration process can negatively affect employees (Podgorski & Sherwood, 2015). There is little information on the resources available to help managers manage employees through a merger.

Leaders are given the responsibility of ensuring workers are managed and retained throughout the merger. The problem I studied was that many managers are unaware of the resources available to them to help manage employees through the merger process. The lack of studies on the resources available to help maintain employees during mergers marks a significant gap in management literature.

Mergers take place on a regular basis. While a merger can be planned between managers from each company, there are often many aspects of a merger that go unnoticed. Managers are not only responsible for ensuring that business performance, motivation, and job satisfaction go on as usual, but also that the well-being of their employees does not go unnoticed, which is often an area of least concern (Podgorski, & Sherwood, 2015). The purpose of this phenomenological descriptive study was to understand the resources available to managers to manage employees during mergers. In this research, I defined resources as programs, training, manpower, departmental support, and communication methods.

In this study, I explored the resources available to managers to help them manage the employees through the process once a merger is announced. I examined patterns and themes from the lived experiences of managers who managed employees from the introduction of a merger until the completion of the merger process. Chapter 2 opens with the literature search strategy and a summary of why Greenleaf's servant leadership theory and Herzberg's two factor theory were best suited for this research. It also includes a review of similar studies that have been based on servant leadership theory.

The remainder of the literature review serves as an overview of merger history and the effects of mergers on both organizations and people. The review of mergers is further broken down as follows: (a) what a merger is, (b) classifications of mergers, (c) history of mergers, (d) why mergers happen, (d) merger success, and (e) risks associated with mergers. The impacts on organizations are broken down as follows: (a) financial impact, (b) business development, (c) governance structure, (d) management structure, (e) decision making, (f) production and goals, (g) technology, (h) training and retraining, (i) systems and processes, (j) management systems, (k) and organizational processes.

The effects of mergers on employees include: (a) organizational culture, (b) employee retention, (c) commitment, (d) trust, (e) communication, (f) attitudes and stress, (g) engagement and motivation, (h) morale, and (i) performance and productivity. In the chapter, I summarize the role human resources can play during a merger and the management styles leaders' use when managing employees. I review four management styles, ending in a summary of why servant leadership is best fitted as a management style to successfully manage employees through a merger.

Literature Search Strategy

I conducted the literature search using multiple databases including EBSCO Host, ProQuest, Google Scholar, and Sage. I started with a broad search of keywords relevant to the study and added additional keywords that emerged from the search. These keywords included *mergers, mergers or acquisitions, merger history, merger success, merger integration, merger effects on people, employee commitment on mergers, employee attitude and merger, employee stress and mergers, communication and merger, merger employee performance, employee trust, employee morale, morale, engagement, productivity, employee performance, employee retention,* and *employee mergers.* Additional words and phrases included *human resources, employee retention, transformational leadership, transactional leadership, authentic leadership, situational leadership,* and *servant leadership.* Keywords related to effects of mergers on organizations were *financial impacts, business development, governance structure, management structure, decision making, production and goals, technology, training and retraining, management systems,* and *work processes.* The key words were searched to ensure saturation of the information.

Conceptual Framework

The conceptual framework for the study is based on Greenleaf's servant leadership (1977) and Herzberg's two factor theory (1968). Greenleaf first started his research while working at AT&T by looking into management development to meet the needs of employees (Shirin, 2014). According to Greenleaf (1959), managers need to continuously improve themselves to have the ability to develop their subordinates. Greenleaf developed his theory after reading the novel *Journey to the East*, which was based on one of the servant man in the plot who had the characteristics to lead without knowing he was doing it (Greenleaf, 1977). According to Shirin (2014), the servant character Leo maintains the spirit of the group by singing and interaction with its members. Spears (2010) and van Dierendonck and Nuijten (2011) noted that a servant leader has the ability to listen, be aware of individual's feelings, have empathy when dealing with people, help the individuals to heal, and be committed to individuals, empowering employees and community growth. When Leo left the group, the group became dysfunctional and lost (Greenleaf, 1977).

Greenleaf (1977) used Leo to describe the attributes of a good leader. He stated that while Leo was just a servant, he realized that when Leo exercised his traits of a leader to ensure the others' spirits remained lifted, it resulted in the people wanting to follow his lead. Greenleaf's theory is that one's natural tendency is to serve the people one leads. Leaders who lead first before becoming a leader have the natural instinct to serve the needs of others before themselves (Greenleaf, 1977). Muhammad, Haq, and Kiran (2016) found that servant leadership is about serving the community they serve first.

Herzberg (1968) spent years as a professor studying motivation. He conducted the first investigative study with engineers and accountants; he then went on to investigate multiple populations (Herzberg, 1968). All investigations resulted in findings that the factors involved in an employee's job satisfaction are different than the factors that contribute to job dissatisfaction. He classified motivators as contributors to job satisfaction and hygiene factors as contributors to job dissatisfaction. Herzberg (1968) mentioned that managers play a significant role in helping employees achieve job satisfaction.

Managers are responsible for seeing their employees through a merger. Mergers are challenging times and employees look to their managers for guidance and support during these times. Servant leadership theory holds that managers should practice to be of better service to their employees. The managers' role has a direct impact on employee's job satisfaction or dissatisfaction and is supported through by the two factor theory. Many scholars have used servant leadership and two factor theories to compare how leadership skills come naturally and can be enhanced.

Many researchers have used servant leadership to compare leadership roles and the effects they have within organizations. Kirsch and Peters (2017) recently studied servant leadership as their basis for developing student leadership, and Akram, UI Haq, and Karin (2016) used servant leadership to understand organizational commitment in high school principals. Güçel and Begeç (2012) conducted similar research on a private university to compare servant leadership and its effects on organizational citizenship behavior. All of these researchers found developing and practicing servant leadership skills had a positive impact on organizational commitment. Leaders play an important role in leading their employees through the merger process.

Jaramillo, Bande, and Varela (2015) conducted a study to explore relationships between servant leadership, supervisor trust, and employee performance. Song, Park, and Kang (2015) researched the role of servant leadership in knowledge sharing and team performance enhancement. Both studies showed that when leaders are servant leaders, their employees' performance increased. Employee performance may increase if the servant leaders work to establish and develop trust (Ardakani, 2012; Bartol & Srivastave, 2002). Leaders play an important role as role models to their employees; therefore, leaders' actions are often shadowed (Jaramillo, Bande & Varela, 2015). The benefits of servant leadership for both the organization and employees are improved job performance (Choudhary, Akhtar, & Zaheer, 2013).

Employees with improved job performance also show their commitment to an organization. Leaders can help employees be committed and improve their performance by their behavior. Doniaa, Rajab, Panaccioc, and Wang (2016) found that servant leadership promotes better job satisfaction. Linden, Wayne, Liao, and Meuser (2013) found that servant leadership also creates behaviors that result in benefits to the whole team. Job satisfaction and improved performance will benefit an organization by giving the employees the motivation to remain with a company throughout a merger.

Jorge Correia de Sousa and Dierendonck (2015) conducted a study to better understand the effects of servant leadership and employee engagement while a merger was taking place. They reviewed engagement, organizational identification, and psychological empowerment and found a positive correlation between servant leadership and maintaining employee engagement during a merger process. When leaders practiced servant leadership in their day-to-day interactions with the employees, the employees were motivated to serve, dedicated, and felt empowered (Jorge Correia de Sousa & Dierendonck, 2015).

Fisher (2009) conducted a study reviewing motivation and leadership in social work management. Social workers rely on their personal experience and practice wisdom (Fisher, 2009). Fisher presented multiple theories to social workers to allow them to choose the theories that fits their own style and found that managers perform better when they work from a model, and that social workers who used theories found many benefits.

Evans and Olumide-Aluko (2010) conducted applied Herzberg's theory to the Nigerian school leadership. The researchers discussed the differences in living conditions for the education staff, as compared to the western world. They concluded that while Herzberg's theory works when applied to the western world, it did not apply to the Nigerian educational leaders. Because of the different workplace influences in Nigeria, Herzberg's motivating and hygiene factors did not affect job satisfaction or dissatisfaction. While Herzberg's theory does apply in the Western world, it may not travel to other parts of the world.

This research study is based on understanding what resources are available to managers to help manage employees through a merger. Applying servant leadership and the two factor theory to my research questions helped me gain an understanding of what resources or skills were used by the leadership to manage the employees through the merger process. Podgorski and Sherwood (2015) stated that employees are often the last to be considered in a merger process. Servant leadership theory relates to how leadership and employees interact during a merger process.

The findings from this study will be beneficial to management teams responsible for managing employees while a merger is taking place. Managers will have a better understanding of the resources applied while managing employees through a merger. The study will also expand on the servant leadership and the two factor theories by researching the benefits of practicing servant leadership in a merger atmosphere.

Literature Review

Mergers

Mergers are a common occurrence in today's global market. A merger is defined as the act of two organizations combining to form one organization (Jewoo & Tianshu, 2014). Vazirani (2015) added to the definition by stating it is a circumstance whereas a company, including all assets, liabilities, and people merge with another company. Others refer to the wave portion as the outcome of shocks mergers have on the economy (Gort, 1969; Mitchell & Mulherin, 1996). Mergers allow two corporations to integrate and share resources, resulting in a larger corporation with a greater opportunity to expand their business. However, mergers can have both positive and negative impacts on companies. Employees have to change and adapt to the newly formed combined company. The formation of new companies through mergers is a common occurrence in today's market place. The merger waves first started at the end of the nineteenth century (Gaughan, 2010; Varizani, 2015) and fell within four classifications (Cartwright & Cooper, 2001).

Classifications of mergers. Throughout the years of merger activity, there are four classifications of mergers: “(a) vertical, (b) horizontal, (c) conglomerate, and (d) concentric” (Cartwright & Cooper, 2001, p. 3). Vertical mergers join a supplier and their customer (Becketti,1986). A chemical distribution company merging with the transportation company carrying their product would be a vertical merger.

Horizontal mergers are results of two companies selling the same product Becketti (1986). Suncor Corporation (Suncor.com, 2017) and Syncrude Corporation (Syncrude, 2017), which both sell crude oil, are in direct competition to each other. If a merger occurred, it would be considered a horizontal merger.

Another category of mergers is a conglomerate merger. This classification is when corporations from unrelated business areas merge (Becketti, 1986; Fish, 2007). Expansion can help a corporation to branch out into another market such as hotel and an airline corporation. A good example of this is EasyGroup Holdings (Easygroup, 2017). This organization started out as an airline business but has since branched into a wide variety of service companies; hotels, rental cars, food stores, and more.

Concentric mergers are when companies acquire businesses in a different field (Cartwright & Cooper, 2001). This happens when corporations expand into a market unrelated to their current business. Branching can widen the corporation’s targeted span of the global market. The results from this type of merger can introduce new programs and strategies the corporation may have to adopt to remain successful. An example is when a large corporation decides to venture into another area of business; buying another business already established in that area.

Mergers are based on the needs of the corporation, allowing the corporation to grow within the current market, expand into another market, or do both. Tavor (2013) found that mergers have existed for over 400 years with a focus on efficiency**.**

History of mergers. Mergers have been taking place over a few decades. There were many different waves of mergers that have taken place and continue to take place today. There are different views on what years the first wave of mergers took place. Gaughan (2010); Vancea (2012), discussed the first waves of mergers took place from 1897 to 1904; however, Vazirani (2015) and Lipton (2006) found the first merger wave was from 1893-1904. Becketti (1986) stressed the merger wave started in the 1890's, but gave no definitive timeline and Banerjee and Eckard (2001) found that it ran from 1897-1903. While the timelines may not align, the late 1800s was the start of the first merger wave to take place.

This merger wave was started during the economic expansion after the depression (Vazirani, 2015). It was mainly companies combining similar products to help improve efficiency and reduce the overall costs (Gaughan, 2010). The nineteenth century was a highly turbulent time for business growth (Banerjee & Eckard, 2001). Most mergers were major horizontal mergers involving oil, mining, steel and other large manufacturing industries (Vazirni, 2015). Becketti (1986) found that this first set of mergers contributed to changes in the laws and regulations regarding mergers. Martynova and Rennboog (2006) found this was the era when companies became bulk companies because of the opportunity to grab a majority of the market. The first set of mergers allowed for corporations to gain power, creating the need for regulations to be put in place to prevent a monopoly.

The second wave took place from 1916-1929 (Gaughan, 2010; Vancea, 2012). This was the result of the United States joining the World War 1 (Vazirani, 2015). In the same era, communication was expanding and reaching multiple geographic regions. This merger wave brought changes to the automobile industry, rail roads, and iron and coal mines (Lipton, 2006). This era ended as a result of the stock market crash in 1929 and the depression (Lipton, 2006).

The third wave was from 1965-1969 (Gaughan, 2010; Tanimura & Wehrly, 2012). Martynova and Rennboog (2006) found that the third wave began in the 1950's and lasted for more than two decades. This era was the start of the conglomeration (Vazirani, 2015). The passage of the new regulation of the Celler-Kefauver Act of 1950 reduced the amount corporations could expand by taking over other unrelated business to expand their market share to benefit from the larger new product market (Martynova & Rennboog, 2006). This wave ended in 1969 when the global oil crisis resulted in the global recession (Martynova & Rennboog (2006). The conglomeration era allowed for larger corporations to have market control and resulted in greater growth and expansion.

After the market had started to recover from the recession, the fourth merger wave took place from 1981-1989 (Gaughan, 2010; Tanimura & Wehrly, 2012; Vazirani, 2015). Hostile takeovers were introduced by the rise of the corporate raider, resulting in the breakup of many conglomerations (Vazirani, 2015), divestitures and going private transactions (Martynova & Rennboog (2006). The United States had record-breaking mergers take place in the 1980's (Gaughan, 2000). This era had many organizations trying to survive but also not sure when the next change was going to hit the organization. Some takeovers happened overnight without notice, leaving the employees wondering if they were going to have a job the next day.

The fifth merger wave took place in 1994-2001 (Gaughan, 2010) and was commonly referred to as the Mega-Merger (Vazirani, 2015; Lipton, 2006). This was the era of the large formation of companies going to a global level (Vazirani, 2015; Martynova and Renneboog (2006). Many companies signed merger deals to maintain their stock prices (Lipton, 2006). This time resulted in a rich environment for mergers because of the expansion of the global economy (Gaughan, 2010). This era ended with the decrease of the stock market and the banks tightening the reins on lending to corporations (Lipton, 2006). It was the first time corporations stretched their markets by merging with companies in the international market. With the advancement of technology, organizations could outsource work to countries around the globe at a cheaper rate. The technology allowed distant workers to complete tasks through the internet at a cheaper rate than local employees in well-developed countries. Technology advancements forced corporations to expand beyond the domestic businesses to remain competitive in the global market.

The Sixth merger wave began three years later, taking place from 2004-2007 (Gaughan, 2010; Lipton, 2006). Hopkins (2008) discussed the merger lasting from 2002-2010, whereas Alexandridis, Mavrovitis and Travlos, (2012) discussed that it started in 2003-2007. This was only three years after the last merger wave. This wave consisted of investments, buyouts and takeovers (Tanimura & Wehrly, 2012; Vazirani, 2015). The main contributors to this era were globalization, low interest loans, and growth of private equity funds (Ezemma-Ekeogu, 2014; Lipton, 2006). This wave ended with a large amount of debt and financed mergers.

Since 2007, mergers have continuously occurred. According to Bouree (2016), many think we are in the seventh wave of mergers today. The year 2015 saw the highest recorded mergers on a worldwide scale (Thomson Reuters, 2015). With the fluctuations of the economy, it will be interesting to see when mergers hit the ceiling in the seventh merger wave.

With this brief history of mergers, the remainder of this section I will review why mergers happen, the success rate of mergers, and the effects mergers have on organizations and the employees.

Why mergers happen. Corporate groups have been merging for decades, but each corporation may have their reasons for tackling the changes that need to be addressed during a merger process. Rodrigues (2014) found that mergers could happen for a variety of reasons: the value of economies, technology, or a decrease in the market size. Mergers often happen to also expand on internal growth (Gaughan, 2000) and to improve a company's competitive position in the global market (Vazirani, 2015).

Bogan and Just (2009) found that financial advantage was the reason behind mergers. Marks and Mirvis (2011) found that companies often merge in an attempt to protect their market share. Sargent (2016) found that mergers often create the opportunity for corporations to reach improvements in the price, quality, and service they provide to their customers. Mergers take place to allow corporate groups to have some gain, depending on the corporation's initiative, such as financial protection, or growth. Stakeholders look to have an opportunity to get a return on investments (Rossi, Yedidia Tarba, & Raviv 2013). When mergers are announced, all original business plans are reevaluated.

The changing of the business plans will involve managers and employees also making some changes. When mergers are announced, the managers are responsible for leading their employees through the merger process. The joining of two companies can create opportunities for growth among the people they employ and the services they provide (Bharwani & Butt, 2012; Kim, Kumar, & Kumar, 2012). Managers and employees play a key role in supporting the success of a company merger.

Merger success. Mergers can be announced at any time, driving the managers and employees onto a new organizational path. The success of a merger depends on many factors. Success rates of mergers are poor and have been said to have a failure rate of 70-90 percent (Christensen, Alton, Rising, Waldeck, 2011). Brinckmann, Müller, and Rosenbusch, (2013); Dauber, (2012); Himmelsbach and Saat (2014) found that the success rate of mergers is only 50 percent.

Companies involved in merging may fail due to pressure to complete the merger without knowing what they are getting (Haransky, 1999). Marks and Mirvis (2011) found that most fail due to financial impacts. Banal-Estanol and Seldeslachts (2011) found that failures often happen because of the lack of communication post-merger. Francis, Hasan, Sun, and Waisman, (2014) noted lack of communication, broken alliances, and lack of information as leading causes of merger failure.

Van Dyke (2015) discussed that for mergers to be successful, there needs to be a governing body to manage the financial issues and have someone lead the other parts of the newly combined organization. May and Noether (2014) discussed that market structure has a large impact on whether or not the merging companies will increase their market share, price, and product output. All merger announcements will have an effect on all levels within the organization.

Successful mergers can have a positive effect. According to Kandžija, Filipović, and Kandžija (2014), mergers can have a positive effect on stakeholders. Hyder and Osarenkhoe (2015) discussed that positive effects could include increase employment rates and job opportunities for the population. Successful mergers can result in culture change, growth within the organization, and increased compensation for management (Bausch, Mueller, & Rosenbusch, 2013). If a merger is successful, the positive effects of mergers may not be seen for three to five years (Ahern, 2012). There are also possible risks and liabilities associated when a merger takes place. According to Bogan and Just (2009), there are risks with every merger.

Risks. Merging two companies together come with risks. There is much at stake when organizations consider merging. While there may be many benefits visible to the stakeholders of each organization, there are many other items needing to be taken into consideration. The structure of organizations intermingle people, processes, and all company applications and practices (Alaranta, & Mathiassen, 2014). Mergers take time and resources to conduct all aspects needed to complete integrate multiple organizations. All risks should be evaluated before organizations take the plunge.

Dauber (2012); Patzelt and Schweizer (2012) found that mergers involving high levels of risks often result in stakeholder loss because of the complex integration factors. Stakeholders need to evaluate the risks associated with all mergers to understand the gain or loss personally and to the organization. While it is known that merger success rate is low, mergers still take place. Stakeholders entering into a merger agreement need to consider all possible risks associated with the merger, the effects the merger will have on the organization, and how the people will be affected throughout the merger process.

Mergers Effects on Organizations and People

Mergers have many effects on people and the organizational outcomes; therefore, is it important to understand the characteristics and events often witnessed once a merger is announced. While managers work through the motions of a merger, the managing of employees continues to be part of their responsibility. According to Haransky (1999), a manager can create an unhealthy environment for their employees. Managers face massive performance improvements to ensure the success of a merger (Sirower, 2000).

A merger can have employees in a world of unknown and managers unaware of how to manage the employees' needs. One of the primary concerns for managers is that most employees relate better with their current company then the merged company (Giessner, Ullrich, & Dick, 2011). One commonly seen change is employees' performance. Significant changes to work environment result in negatively affecting work productivity (Duffield, Kearin, Johnston, & Leonard, 2007). There are many things having an effect on the employees, resulting in managers having to try and manage while working through the merger.

In a review of mergers and their effects on employees, there are many studies conducted on job responsibilities and managers' added responsibilities during a merger process. Kandžija, Filipović, and Kandžija, (2014) found that previous studies have focused on other aspects of the merger such as company culture, the effect management style has on the success of the merger, the structure of the organizations, and technology. There is a lack of research in understanding what resources are available to managers to help managers be successful in managing their new responsibilities as well as continuing to manage the employees through the merger.

Impacts on Organizations

When mergers are announced, there are many factors that need to be taken into consideration. Cording, Harrison, Hoskison, and Jonsen, (2013) found that the integration process is critical to the overall success of a merger. Unfortunately, the integration process also results in the elimination of redundancies and reduction of jobs throughout the organization (Schweiger, 2002). The integration of two companies will result in time required, by the management teams, to help manage the merger process. This time commitment puts extra responsibilities on the managers, causing them to give less attention to the day-to-day activities of their employees.

The process of executing a merger, can result in managers having added responsibilities to help work through the merger process. There are many different ways mergers can be managed to help the merger process be smoother on the employees, managers, and the stakeholders. Van Dyke (2015) discussed that guiding principles should be developed to manage the integration. Most organizations have a business strategy before entering into a merger with another company. Therefore, Gunkel, Rossteutscher, Schlaegel, and Wolff, (2014) found that all managers need to have an integration plan to help assist with the success of a merger. Creating an integrated business plan should include multiple factors such as integration of teams, communication of information, and financial impact to the organization.

Financial Impact

Mergers have been increasing on an international scale (Tao, Liu, Gao, & Xia, 2017). One of the main reasons for a merger is often financial. Kelly and Adhikari (2012) found that most companies merge for the purpose of growth, efficiency, and equity. While one would hope all mergers would increase finances, this is not always the case.

Mergers result in a distribution of financial assets among the stakeholders of both organizations (Billett & Key, 2016). According to Al-Hroot (2016), Bhabra and Huang (2013), and Poornima and Subhashini (2013), mergers do not influence corporate firm performance. Ghatak (2012); Kumar and Bansal (2008) supported this by finding acquired firm’s finances are negatively affected. Stakeholders need to understand the financial impact on the corporation before choosing to merge.

Manokaran and Radharukkumani (2014) discussed that mergers are important for corporations to grow and expand in the market. Mergers also help companies during hard times to acquire other companies and expand their operations or expand into another field (Manokaran & Radharukkumani, 2014). When companies are trying to survive, a merger can help an organization to share or cut cost by acquiring another company with the service already provided. Sharing costs can reduce the overall financial burden often felt by organizations during hard times or when competing in a strong market.

Competition can drive organizations towards a merger in order to continue to grow. According to Kemal and Shahid (2012), all companies want to continue to expand their business. However, a merger may not be well received from all stakeholders of the merging companies. Key stakeholders have a great interest in the personal financial impact of the merger. Stakeholders often resist a takeover because they feel they lose the ability to trade and maintain their board seats (Bugeja, Da Silva Rosa & Lee, 2009; Gilson, 1990; Harford, 2003). In the event of a merger failure, stakeholders may not be able to secure financing (Baker, Pan, & Wurgler, 2012). Securing finance is important to stakeholders to allow themselves to continue to grow.

When a merger is agreed upon by the stakeholders, there is a need to make a change in the current business plan and start working towards a new business plan. The business plan needs to include the managers to help coordinate and carry out the new strategy. Business plans help to set the organization up for success and set the financial goals for the new organization. Financial decision making and impacts can add to the stress and responsibilities of managers during a merger taking place.

Business Development

During a merger, business development plans are still needed to ensure company goals and production continue to be achieved. Managers help the employees to ensure company business plans are met. Managers not taking the correct actions during a merger may affect organizational growth and financial performance (Baker & Niederman, 2014; Gemino, Reich, & Sauer, 2012). New business plans being developed for the merging of the new combined organization will need to include multiple factors to be taken into consideration. Managers need to consider the impact of combining multiple programs while taking into consideration how it will affect the employees they manage.

Governance structure. When two companies merge, a new governance structure needs to be created to manage the new company. Goel and Sapra (2015) discussed that a governance structure allows managers to have a route to direct all decision making. Marcinkevičiūtė and Žukovskis (2016) found that, for managers, working in a changing environment increases the complexity and difficulty of decision making and managing employees. Combining companies and roles has managers in need of having a corporate structure to help with the constant change. Having a corporate structure will also assist managers with corporate decisions required during a merger. An organizational governance structure will have a well laid out management structure. The management team of the governance structure will then manage and make the decisions regarding the new organization.

The structure of management. A newly formed management team is needed to take on the management role for a newly combined organization. This team will help set up the employees and the organization for success. The managers are responsible for helping the employees get adjusted into their role within the new organization. The management team also has a responsibility to ensure the business moves ahead by setting targets and meeting goals.

When managers are placed in a position of managing through a merger, a great amount of responsibility is placed on them to achieve success through creating and meeting new targets, managing the day to day activities, and retaining employees to help achieve the goals. To add to the responsibilities, the manager needs to make decisions on reducing redundancies and eliminating jobs. Mergers are often responsible for a lot of layoffs (Bellinger, 1996). These decisions can have an effect on the relationship between a manager and their employees.

Decision making. Managers are responsible for ensuring their teams are effective and meet the organization’s targets and goals. Decision making is a sensitive process (Nikolić, Bukurov, Erić, & Stanković, 2016). During a merger, managers are responsibility for carrying out decisions that have been made by the stakeholders of the newly combined organization. Managers may not have a voice in the decision making, even when it affects their employees. However, they still need to focus on the overall success of the organization.

Managers continue to manage employees through a merger process, however, the decisions being made by the managers may not seem fair or reasonable to their employees. Implementing the decisions may cause issues between the relationship of the manager and the employee. According to Hui-Ru, Min, and Pian-Pian (2016), knowledge sharing is key to maintain employee performance. Managers need to be able to maintain a good working relationship with the employees to retain the employees through the merger. The managers have a responsibility to ensure daily goals are met by adopting new programs and managing challenges (Shaw, Dineen, Fang, & Vellella, 2009).

Production and goals. Production and goals still need to be met while the merger process is taking place. Managers want to keep their employees motivated while the final details of the merger are taking place. Once the merger is complete, the new management group of the organization will be setting new production targets and goals for each team. This may cause an increase in stress among the employees.

Change in production and goals may cause extra stress on the employees. While they have been given targets and deadlines, the joining of organizations may require adjustments for some of them. According to Lublin (2001), mergers increase stress and production suffers. The manager has to be prepared to help maintain motivation during the merger process to ensure production is maintained.

Technology. Information technology is always one of the major challenges for companies that are merging (Chin, Brown, & Hu, 2004). Over the last few decades, technology has advanced greatly, creating opportunities for companies to invest in best fit programs for their purpose. Chin, Brown, and Hu found that information technology had changed drastically creating a critical issue for managers of merged organizations. Merging two organizations can create an overabundance of technology programs. The managers will have the task of deciding which programs best fit the new organization.

Choosing new technology programs can be costly. The organization cannot run all the combined programs; therefore, decisions will have to be made on what programs best fit the newly combined company. Once the programs are chosen, a portion of the employees will require training on the new programs.

Training/Retraining. Training can be very expensive for a newly combined organization. The organization will have to spend the time and money on training the employees. Providing training to all employees after a merger can provide an overview of the job and the structure of the organization (Louis, Posner, and Powell 1983; Saks 1996). Training can have a positive impact on employees' commitment to the organization (Yalabik, 2013). However, it will take time and planning resources from the organizations budget.

Offering training to the employees will give the employees knowledge about the newly formed company, the chosen programs, and the expectations of each employee. Investing in employees helps to give the employees a sense of worth. Chandler and McEvoy (2000) and Dalziel (2010) found investing in employee training will lower employee turnover and result in lower turnover costs. Some employees may be frustrated with the number of changes and the requirement to retrain on systems. Managers need to be open about the purpose of the training and why the training is beneficial for the employees.

Systems and Processes

All companies have established systems and processes to assist with operations running more reliable and efficient. When two organizations merge, the managers have to make a decision about which systems and processes should be used in the new organization. Management systems and processes need to fit the organization needs.

Management systems. Management systems are often utilized within an organization to guide day to day operations. Under the new organizational management team, decisions will have to be made to choice which management systems they will continue to use to operate the new company. According to Marcinkevičiūtė and Žukovskis (2016), the manager's style helped to determine the management process. The management system chosen for the new organization will have to fit the new managers' style and needs; therefore there may be more training and communication required for the employees.

Organizational processes. Managers use work processes to help maintain reliability and improve production. The combination of organizations requires stakeholders to look at the current work processes and chose the work processes that best fit the new company. Once again, the managers will have to communicate changes of the current system to the employees. This will help to ensure adequate information regarding the changes is heard from by the employees'. Employees will be familiar with their organizational work processes. Managers will need to constantly reinforce the changes to the processes designed within the new organization. Open communication is the key to retaining employees.

Organizational Culture

A culture is created within a company; therefore, when two or more companies merge, this means that two cultures merge. Muscalu (2014) discussed organizational culture is hard to define however it can be viewed as having three key elements: beliefs, behaviors, and attitudes of the people. Walt (2005) found that a company's culture is not its practices and processes, but how decisions are made, the company structure, communication methods, teamwork, and employee satisfaction. Weber and Tarba, (2012) found organizational cultures could have a direct impact on the manager and employee behaviors that can lead to the success of a merger. However, leaders often do not value or consider organizational culture during a merger process (Van Dyke, 2015).

Dealing with different cultures is a difficult task for managers. Patzelt and Schweizer (2012) found that using methods to integrate the cultures before a merger helps with the success of a merger. When a merger is to be announced, managers need the support of their employees to continue business-as-usual so they can focus on the success of a merger. Employees often commit to organizational change because they believe the change is valuable, they feel obligated, or it would be costly to them to do otherwise (Soumyaja, Kamalanabhan, & Bhattacharyya, 2011). Managers need to have a good understanding of the differences of the cultures within the two companies.

Understanding the differences of cultures will help managers with the integration of personnel from both companies and is important to the success of employee retention. It is important for managers to create an environment where employees continue to be motivated and have job satisfaction in order to retain them during and after a merger.

Managing cultural differences is an added responsibility for managers. When different cultures come together, they must combine or change to form one culture for the merger to succeed (Henneman, 2013). When joining companies with different cultures, the personnel of the company who’s culture changes the most, have to adapt more. The forcing of the change in culture often can leave employees and managers in a place of discomfort and unfamiliarity. One suggestion is for corporate cultural differences to be evaluated before the merger begins (Weber, & Tarba, 2012). Understanding the cultural differences and similarities will help managers engage and plan the merger activities, lay the ground rules, and have a better understanding how day-to-day operations are managing within each culture. Differences in culture, especially if they remain unknown or unaddressed by managers, can sometimes cause significant conflict among the employees and managers. Managers can benefit from having the resources available to plan for the differences and help transition the employees through the merger process.

Adjusting the organizational culture can result in negative consequence (Fairweather and Rinne, 2012). Organizational cultures determine how the employees interact. It is important for the employees of both organizational cultures to interact and work together. The new organizational group will establish its own culture through interaction of both organizational cultures. Establishing a new culture will take some time, however, managers need to remain open and communicate with their employees throughout the change implementation. Open communication can help improve employee retention.

Employee Retention

Managing employees through a merger is an added responsibility for managers. Too often employees' needs or concerns are not addressed, and they end up leaving the company. Employee retention is one of the largest concerns when a merger is announced. Employees feel a sense of loss and confusion, causing them to lose the commitment they once had. During the merger process, there is a stage of unknown, and often employees are in the dark about what is happening to the company, their job, and their benefits.

Employee benefits are often affected when companies go through the merger process. Merging two companies means merging two systems and programs currently existing within the individual companies. To reduce cost through the merger, programs need to be reviewed, and the best are to be taken from each program to create one program for the merged companies. Sinkin and Frederiksen (2012) found that working through the benefits and compensation packages is one of the most challenging tasks of mergers. In the process of creating a new program, there are often benefits taken away or added to the program. Employees are directly affected by the benefit packages. This can result in employees being frustrated, not liking the changing of the programs, and wanting to leave the company.

Employees leave a company during a merging process because of many reasons. Change is inevitable during a merger, and all changes will have an effect on the employees. Leaders need to work with the employees through changes, so they remain loyal to the company. Employee turnover is a cost that can be controlled through managers using resources to manage the employees through the merger process. Managers having additional resources and skills can help the employees through all the changes. Employees feeling engaged and feel part of the merger process and can increase employee retention.

Merger Effects on Employees

Employees can feel many effects during a merger. Marks and Mirvis (2011) found that most mergers fail and cause a huge effect on the people involved. Mergers cause employees to be unsure of their jobs and their futures. According to Choi, Chung, and Du (2014) and Weber and Tarba (2012), employees behave differently once a merger has been announced. There are many factors that make a difference in whether employees are willing to remain with a company throughout a merger. The employees want to be informed of the merger process as it is taking place.

When mergers are announced, employees have plenty of unanswered questions. They look to their manager for the answers. Managers are responsible for informing the employees on the progress of the merger and how the merger will affect them. There are many different feelings the employee's experience, resulting in them losing faith in their manager and their place in the future of the organization.

Employees who are not managed well will eventually lose their commitment to their managers. This section will discuss the effects that employees go through; commitment to their manager and the organization, trust relationships between the employee and the manager, open communication, attitudes and stress of the employee, engagement and motivation, morale, and employee performance, and productivity.

Commitment. Employee commitment can be affected through the merger process. Continuous support and setting employee expectations throughout the merger can increase job satisfaction (Lim, 2014). Often job satisfaction and the productivity of employees are based on the environment within the organization (Ahmadvand, Heidari, Hosseini, & Majdzadeh, 2012). Too often, mergers have a negative effect on employee commitment to the company (Roundy, 2010). It is a manager's responsibility to assist employees to remain committed to the organization throughout the merger. Often management are unaware the employees are not feeling committed; therefore, managers need to work closely with their employees to ensure employees values are taken into consideration when going through a merger.

Employees are involved in or affected by all changes that accompany a merger. According to Mangundjaya (2015), change is not successful without the support and commitment of the employees. Employees help the managers with the change logistics, and other changes needed. Change can have a great effect on employees. When a merger is announced, employees understand change will happen. Employees have to be willing to commit to change, and therefore organizational trust needs to be established (Mangundjaya, 2015).

Trust. A positive employee-manager relationship is established on trust. Employees want to feel that they can trust their manager to have their best interest at heart. Trust is an established agreement between the employee and the leaders of the organization (Rousseau, 1989). A merger can be perceived as a break in the agreement between the employees and their manager. Breaking the agreement can result in individuals losing trust in their leaders within an organization (Bansal, 2015; Jafri, 2012). It is important for leaders to continue to maintain an open and trusting relationship during a merger announcement. Leaders can maintain a relationship with their employees through open communication.

Trust is not transferable among employees or managers during a merger process (Bargeron, Lehn & Smith, 2015). Trust takes time to be established and therefore new managers assigned to new employees will have to spend the time to establish relationships. According to Buono and Bowditch (1990) and Shrivastava (1986), trust is essential to the integration process during a merger. When managers take into consideration the integration factors of employees' uncertainty, dealing with conflict, and feelings of insecurity, during a merger, it helps maintain trust for the employees (Thakur & Bansal, 2015).

There is also organizational trust. While organizations are now claiming transparency and contributory practices, all processes need to be integrated into the combined company, creating challenges (Bansal, 2016). The transition time for the integration of processes can also create an atmosphere of tension and mistrust. The integration processes can be viewed as unfair by some employees (Hopkins and Weathington, 2006) since changes may occur in both corporate programs. Employees are unaware of the intentions of the newly combined organization; therefore often they will not trust the motives of the managers within the new organization. Open communication of the intended changes will help to develop employee trust (Bansal, 2016).

Communication. A manager's lack of communication can have negative effects on employees through a merger. Employees often create their interpretations of what is going to happen when a merger occurs (Bovey & Hede, 2001a). Management can help reduce uncertainties by communicating why the merger is necessary (Giessner, Ullrich, & van Dick, 2011). Employees may learn about the merger occurring, however, their main concern is how the merger will affect them. Open communication can help the relationship between the manager and the employees. According to Angwin, Mellahi, Gomes, and Peter (2014) and Muller (2006) communication is vital throughout any change process.

Communication during a merger can help reduce stress and increase trust and respect for employees (Benton & Austin, 2010). Leaders need to communicate all events involved in a merger to the employees (Roundy, 2010). To help maintain open communication, work communication processes should be embedded throughout a merger (Wittig, 2012). A more efficient communication process should be accepted and implemented by managers (Gray & Laidlaw, 2002). Many times managers do not understand the importance of communicating during a merger. Open communication of merger activities can help reduce or eliminate the unknown and have the employees feel they are part of the merger process.

Communication with employees must be done as the information becomes known. Rafferty (2007) found that company managers should provide transparency as much as possible on all decisions and dealing with changes to the employees. Often, employees are affected by the merger through changes in benefits, job roles, responsibilities, or compensation. Employees want to understand the impact of the changes so they have time to digest the information and then be given the opportunity to ask questions. Managers need to have open communication with the employees to establish a trusting relationship with them.

Too often managers do not communicate about the changes that come with a merger, and it causes stress among the employees. Employers who maintain open communication channels with the employees during a merger will increase trust, commitment, and innovation among the employee (Kim, 2011). Open communication and information exchange are critical during a merger (Bansal, 2015; Birkinshaw, Bresman, & Håkanson, 2000). Not communicating effectively will result in merger failure (Aguilera & Decker, 2004).

Communicating the merger strategy will help the employees understand what is happening around them and have them feel like part of the process. Managers need to have the skills to know when and how to communicate the details of the merger process. The lack of communication can add stress to the employees.

Attitudes and stress. Managers sometimes think the integration of two organizations is an easy process; however, they often are wrong (Galpin & Whittington, 2010). The combination of employees from different companies' results in employees having to work together; however, trusting and working together is an issue (Yan, 2012). People need to spend time building relationships in order to trust one another. The lack of trust creates a difficult working environment, often increasing stress in the workplace. Leaders need to understand the impacts of a merger on employees and take measures to reduce the possibility of stress in the workplace (Hinescu, 2014).

Stress can lead to many things for both employees and managers during a merger process. The stress of not knowing what is happening may lead to insecurity. Insecurities can lead to employee competitiveness because employees are concerned about their jobs (Hinescu, 2014). Employees fear the financial impact on the organization when a merger fails (Wang & Wang, 2012). When stress levels rise within an organization, there is an increase in absenteeism. Absenteeism can also be because workplace reorganization can lead to employees having heath issues (Kjekshus, Bernstrøm, Dahl, & Lorentzen, 2014). Long-term illnesses also increase though a merger process (Kjekshus, Bernstrøm, Dahl,

& Lorentzen, 2014). Managers who do not handle mergers correctly will see an increase in employee concerns (Muller, 2006).

Stress is part of all merger processes (Nikandrou, Papalexandris & Bourantas, 2000). Employees' stress levels can be managed if they feel they are informed of the merger details, part of the process and understand how the merger will affect them. Managers who have the resources available to them can help manage the stress levels of the employees and themselves.

There are many different phases to a merger process. During this process, managers need to help the employees move through each stage (Muller, 2006). Communication and awareness of each phase of the merger will also reduce the employees' stress level and keep them actively engaged in the process. According to Drzensky, Lupina-Wegener, Ullrich, and Van Dick (2013), employees experience high levels of stress and concern during a merger. The stress levels of employees can be managed by managers who lead through a servant leadership style.

Engagement/Motivation. Employee motivation can be affected when a merger is announced. Frick and Drucker (2011) defined motivation as the inner drive an employee has to do their work. According to Fowler (2015), managers are responsible for motivating their employees, however if the employees are disengaged, they will still leave the company. Motivation normally comes from within; however, a manager can help with the process of motivating the employees. Motivating employees is best done when a manager gives the employees a reason to be motivated (Fowler, 2015).

Employees need to remain motivated throughout the merger process to help continue to meet the organization’s objectives and targets. Managers need to help employees remain motivated by engaging and communicating the activities of the merger. Effective manager and employee communication will help reduce potential resistance during the merger process (Lutgen-Sandvik & Tracy, 2012).

Morale. Not all employees are prepared for when a merger is announced. In most situations, employees find out by the public media or through other sources. Once a merger is announced, employees have mixed feelings (Benton & Austin, 2010). The morale of a person can have an influence on how they react to the announcement of a merger. Wakeman (2016) found that one’s mindset could set the stage regarding how they see the world and how it affects their surroundings. Announcements of a merger will force employees to step out of their comfort zone and have to adapt to the coming change (Wakeman, 2016). Not all employees have the abilities or skills to adapt to change. Wakeman suggested that managers should equip their employees with the skills to adapt to change.

According to Costello, Kubis, and Shaffer, (1963), employees with good morale are better suited to accept the merger process. Low morale affects employees’ productivity and can affect other workers around them (Benton & Austin, 2010; Buono & Bowditch, 1990). Employee morale is important for managers to understand and consider when preparing to announce a possible merger. Communication of the changes to come will be the role of the employee’s manager. According to Gutknecht and Keys, (1993) managers can improve employee morale by communicating the changes, making plan, and helping plan jobs for the employees in the new company. Communication of plans will help the employees be informed so they can focus on their jobs and remain productive.

Performance and productivity. Mergers often lead to employees feeling overstretched and overburdened (Muller, 2006). The employees are left in the unknown and are not sure what their future holds. Engaging the employees throughout the process will help them remain productive and continue to perform. According to Cowart (2014), to ensure productivity is up, employees need to be engaged. Human resources personnel can help with engaging employees to maintain their performance and productivity throughout the merger process. Resources are often available through the human resource department to help the management team with engagement.

Human Resources

Human resources personnel can play an important part in a merger process. A merger involves working with the employees from two different companies with two different cultures. According to Marks and Mirvis (2011), human resources personnel understand the importance of combining cultures with systems, employees, and service. They can help facilitate the culture change needed by focusing on the changes needed and not the merger details (Barratt-Pugh, Bahn, & Gakere, 2013). Managing cultures is a soft skill; leaders may not understand or have the resources to do so adequately.

Human resources personnel recently have been seen as providing soft skill resources to managers during a merger. Some soft skills are cultural differences, mismatch of leadership vision, communication, and structuring of human resources policies (Nagar, Masih, & Badugu, 2012). These skills are not necessary skills that all managers have; therefore, having access to these resources can help managers with having a merger go more smoothly.

Some of the resources to help managers with the merger process can be provided by the human resources department. The human resources personnel can help managers develop an integration plan with the resources and tools to work through the merger process (Podgorski & Sherwood, 2015). Human resources personnel can be a resource for the management team through all phases of the merger integration (Podgorski & Sherwood, 2015).

Management Style

A manager's style can have a direct impact on the employees during a merger. Managers have the ability to directly influence the behaviors and actions of employees (Pereira, & Gomes, 2012). Managers need to understand their employees' needs and what motivates them, especially when a merger is about to be announced. There are many different management styles, and there is not one management style that can manage all employee personalities.

According to Parolini, Patterson, and Winston (2009), Schneider and George (2010), and Gonos and Gallo (2013), there are many factors that influence a management style. Therefore, it is important managers, who are in charge of workers during a merger, understand their leadership style and know how to be an effective leader to their employees. Several management styles are predominating with management today. There are benefits, to the employee, of different leadership styles when working through organizational changes. The leadership styles discussed are; transformational leadership, transactional, authentic, situational, and servant leadership.

Transformational Leadership

Transformational leadership style can help with a merger. A transformational leader is made up of many traits. According to Antonakis, Avolio, and Sivasubramaniam (2003), transformational leaders are charismatic and consider each employee individually. McLaurin and Amri (2008) discussed that transformational leaders create vision and clarity to all employees, and Campbell and Gavin (2013) added that they promote productivity. Grojean, Rsick, Dickson and Smith (2004) found that transformational leaders have a positive effect on employees, the organization, and also the group cohesion and employee's beliefs and values.

Not all managers have transformational leadership style; however, the managers that do can help the employees to adapt to the merger. Managers who do not lead by transformational leadership style need to understand the importance of how this style can work to support and motivate employees through a merger. According to Fisher (2006), transformational leadership is successful when an organization is exposed to change.

A merger announcement will require the leader to be able to answer the employee’s questions about the unknown. Transformational leaders can have a positive effect on the employees through their ability to build trust and empower them to adapt to the change (Avolio, 2003). Employees exposed to this type of leadership will be more committed throughout the merger process and the organization will experience improved employee retention (Chi and Pan, 2011; Dimaculangan and Aguiling, 2012).

Transformational leaders help the employees to move through the merger process while having a leader that allows them to be part of the process. Leaders with transformational leadership styles can focus on the activities required during the merger while maintaining the commitment of the employees (Swati Mittal, 2016).

Transactional Leadership

Transactional leaders differ from transformational leaders with regards to the leader's focus on employee achievements (Lord, Brown, & Freiberg, 1999). This results in leaders focusing on the individual achievements over team achievements (Kahai, Sosik, & Avolio, 2003). A merger announcement will cause disruption in the daily activities of both the employees and the manager; therefore a manager will need to ensure their employees continue to meet their objectives while the merger is going through the process. Transactional leaders like to focus on maintaining the day-to-day activities, even with the announcement of a merger (Cline, 2015).

Authentic Leadership

According to Kruse (2013), authentic leaders are self-aware and genuine, they connect with their employees, and they are focused on long term results. Mergers require a great deal of a managers' time, therefore, authentic leadership attributes can contribute to the success of a merger. Fusco, O'Riordan, and Palmer (2016) found that authentic leadership style contributed to the merger by maintaining employee engagement and performance. Employee engagement is important for the success of a merger since managers rely on the employees to complete the daily tasks required to meet the company goals. Managers utilizing authentic leadership can focus on the concerns of the employees by providing support and job satisfaction while the merger processes are implemented in the newly formed organization.

Situational Leadership

Situational leadership theory was first introduced by Hersey and Blanchard (1982). The theory was based on the idea that a leader adjusts their leadership style to the development needs of their employees. With this in mind, a merger would require a situational leader to take on multiple leadership styles to maintain the development of their employees through the merger process. Each employee will react differently to the announcement of the merger. Managers that manage through the situational leadership style will be a benefit, to the employees, through the merger process. Employees' performance during a merger is dependent on the leadership's effectiveness (Morrison, 2010). The managers will need to ensure the employees continue to be engaged and meet the organizational goals while the merger is taking place.

Servant Leadership

Servant leadership was first introduced by Robert Greenleaf in 1977. Servant leadership is based on the premise of managers serving their employees first. Cline (2015) found that servant leadership focuses on the follower's needs. Allen, Moore, Moser, Neill, Sambamoorthi, and Bell, (2016) found that servant leaders focus on the day to day activities of the employees through coaching, putting employees first, and helping them be successful. Mergers create a great strain on employees, triggering managers to work closely with their employees. Managers who do not understand or have the resources available to learn how to manage the employees through a merger may have a direct impact on their employees resulting in hindering the merger process.

Managers who have the appropriate resources and skills can work with the employees to help manage them through the merger process. Unfortunately, not all managers have the resources or have access to someone that can help them guide the employees through the process. According to Cowart (2014), one of the most common reasons that employees leave companies is poor managers.

In review of multiple leadership styles, servant leadership is best suited to manage employees through a merger because the leaders are focused on the welfare of their employees first. Employees seem to get lost when changes occur in an organization; however having a leader that has the best interest of the employees is best suited when a merger occurs. The correct leadership style will be important to help guide the employees through the steps of the merger process, communication effectively and focus on the welfare of the employees.

Benefits of Addressing the Gap

Mergers are still taking place among corporations today. Advancement of technology allows corporations to seek in the global market the best-fit opportunity for a merger. While employees are still considered important to an organization, they are often the last to be considered when a merger occurs (Komornicka, 2015). Losing employees is a continuous cost to corporations (Campbell & Alleyne, 2002).

Mergers take place for many reasons, all resulting in managers having to maintain day-to-day activities while implementing the merger changes. All types of mergers have effects on the organizations and the employees. Cording, Harrison, Hoskison, and Jonsen (2013) and Gunkel, Rossteutscher, Schlaegel, and Wolff (2014) discussed the importance of managing the merger integration, and Van Dyke (2015) found that developing guiding principles can help manage the process. Managers have a big responsibility to ensure the merger's disruptive effects on the organization and employees are minimized.

Manokaran and Radharukkumani (2014) supported the need for corporation growth through mergers. Through the merger, there are many effects on the organization and extra demands on a manager. Organizations require a new governance structure to lead and manage the new organization, integration of programs, and retraining of employees on the new systems. With a new organization comes the formation of a new culture. According to Weber and Tarba (2012), organizational cultures directly impact manager and employee behaviors. This can help with the merger integration process.

Recent studies have applied servant leadership to other situations involving leaders that apply soft skill resources to understand behaviors, development of people, and relationship and trust performance. Marks and Mirvis (2011) found that mergers have a huge effect on employees. To achieve a deeper understanding of what resources managers may have access to, which may help manage their employees through the merger process, my phenomenological descriptive study focused on understanding what resources or skills the leaders used to help manage the employees through the merger successfully.

Understanding the resources or soft skills used by the manager to manage the employees while a merger is taking place will help benefit future managers involved in mergers. The questions in my study helped to identify what resources were used and the benefits observed for both the manager and the employees. Retaining employees through a merger is largely the responsibility of the managers. Knowing what resources were successful will give managers the opportunity to utilize similar resources during future merger integration processes. This will lessen the stress on the managers and help increase employee retention. Increased employee retention will be beneficial to the organizational success and increase the merger’s likelihood and scope of success. As found by Parris and Peachey (2013), Greenleaf's servant leadership theory is not just a management style but the way of life a manager chooses to serve as a servant to their employees. Leaders that utilize resources can be better managers to their employees.

Summary and Conclusions

Corporate managers are changing the way they do business because they need to stay competitive in today’s fast-moving world. Organizational leaders create opportunities through merging companies to provide greater services to multiple markets. Leaders are responsible for assisting with implementing changes and continuing to manage the employees during a merger. Managers need to ensure that their employees are continuously informed and continue to be motivated through challenges. Managers who can manage their employees and the merger process together will have a greater chance of employee retention. Those managers that do not have the resources available to help with the process will have a greater chance of employees leaving the company for better opportunities.

Managers can feel extra pressure, during a merger, as a result of managing employees through a merger and continuing business as usual. Managers often focus more on the integration of company assets and resources and forget to include the needs of the employees. Employees feel lost in the process and seek to find another company that can meet their personal needs. Losing employees is costly to all organizations because of the retraining and downtime. Both managers and employees try to understand how to make things work; therefore, it is important for managers to continue to focus on the employees throughout the merger process through resources available to them.

It is important to understand what resources are available to managers to help manage the employees through a merger. Utilizing resources to manage employees through a merger will assist the managers in helping the employees work through the merger, less stress on the employees, and maintaining employee job satisfaction. Employees who have their needs met will remain happy, and the result will be an increase in employee retention. This will benefit the management team due to decreased costs, as employee turnover can cost organizations millions of unnecessary dollars. My research can provide insight into what resources are available to help leaders manage the employees more effectively.

My study will have positive social impacts on the employees, managers, organizations, and business community involved in mergers. Understanding what resources are available to managers to help manage the employees through a merger will allow managers to understand how to improve their management of employees during changing times. The employees will benefit by establishing and maintaining better relationships with their managers and by experiencing a smoother transition during a merger. This will result in better employee retention. The improvement of employee retention will assist with greater organizational stability. Lower turnover rates can help reduce the financial impacts on organizations by not having to hire and retrain new employees so often.

As a result of this study, the larger manager community will have greater knowledge of how to contribute to the success of an organizational merger through improving employee management. Employees who feel their needs are met will continue to be loyal to their managers and contribute to the success of the merger. Understanding the resources available to a manager will allow them to manage their employees successfully through a merger.

In this chapter I reviewed the history of mergers, classifications of mergers, and the successes and risks associated with mergers. I then discuss the effects of mergers on both organizations and the people. To explore organizations, I reviewed financial impacts, business development, decision making for management, meeting production and goal achievement, and technology requirements. I also discussed the effects of mergers on employees related to training and retaining of the employees, systems and processes, employee commitment, trust, communication, attitudes and stress, engagement and motivation, morale and performance and production.

This chapter also captured how human resources personnel can assist the managers with soft skills to manage the employees effectively through a merger. A review of employee retention was also discussed. A leader’s style will make a difference in how an employee can relate to their manager, especially when a merger is taking place. I discussed five leadership styles and summarized with the reasoning of why servant leadership is a good leadership style to be practiced by managers during a merger.

In Chapter 3 I will outline the research design and methodology of the research study. It will include the differences in research design, the rational for the chosen research design, and the role of the researcher. I also review how the participants are to be selected, confidentiality of the study and interviews, how the interviews will be conducted, and the method of analysis. I end the chapter with a review of the credibility, transferability, dependability and confirmability of the study. Ethics procedures are included in the chapter to ensure the protection of the participants identified and information collected.

Chapter 3: Research Method

Mergers take place between companies on a regular basis. While a merger can be well planned, there are often aspects of a merger, such as employee wellbeing, that go unnoticed. Managers are not only responsible for ensuring that business performance goes on as usual, but also responsible for ensuring that the wellbeing of their employees does not go unnoticed, which is often an area of least concern (Giessner, Ullrich, & van Dick, 2011). The purpose of this phenomenological descriptive study was to understand the resources available to managers to manage employees during mergers. For this research, I defined resources as programs, training, manpower, departmental support, and communication methods. Chapter 3 includes detailed discussions of the research design, the rationale for the design choice, the role of the researcher, the methodology used in the research, and the procedures for recruitment, participation, data collection, and triangulation.

Research Design and Rationale

Researchers use three primary research methods: qualitative, quantitative, and mixed-methods. In the following section, I outline my reasoning as to why I chose a phenomenological, descriptive study design among the choices of qualitative study methods. The section will end with a review of the key supporting questions and how I conducted the interviews.

Research Methods

Qualitative research. According to Hays and Singh (2012), Morrow (2005), and Singh and Shelton (2011), qualitative researcher requires skills similar to those of a counselor in regards to interviewing, social atmosphere, and reaction to the situation. Greenhalgh and Russell (2010) and Ramiller and Pentland (2009) reported that qualitative study is about exploring and interpreting the social aspects of life. Qualitative studies consist of a researcher collecting data through observations, documents, or interviews. There are times when more than one data collection technique is required. This type of research requires that a researcher wants to explore an area and therefore asks questions for further clarification. Qualitative methods are better suited to explorative research (Hope & Dewar, 2015).

Quantitative research. Quantitative research differs from qualitative in that it uses surveys and experiments to gather research data. According to Hope and Dewar (2015), the quantitative method requires the collection of extensive data, especially when testing associations among factors. This research requires a much larger population to ensure the sampling can reach numerous people to ensure saturation. Quantitative studies start with a hypothesis and variables to prove or disprove. My research study did not have a hypothesis; therefore a quantitative method was not suited for this study.

Mixed method research. Researchers first used mixed methods research in the 1980s (Tashakorri & Teddie, 2003). Mixed methods research consists of using a combination of qualitative and quantitative methods. Using mixed methods allows researchers to obtain data from several perspectives (Bulsara 2015; Jirojwong, Johnson, & Welch, 2014). Researchers can decide to conduct each phase simultaneously or as separate phases. A mixed method will take longer to complete than a qualitative or quantitative method because a researcher is analyzing two different sets of data.

There are multiple categories that can be used to make up the design of a mixed methods study. Wurtz (2015) reported six categories of mixed design that researchers use: (a) sequential explanatory design, (b) sequential exploratory design, (c) sequential transformative design, (d) concurrent triangulation design, (e) concurrent nested design, and (f) concurrent transformative design. All six designs require data collection and then analysis by numerical and data interpretation. According to Strudsholm, Meadows, Vollman, Thurston, and Henderson (2016), a mixed method is a point of integration of data and how the researcher approaches and integrates the results of the study. While this is a very thorough method, the lack variables prevented me from using this method for my study.

Research Rationale

After reviewing the three possible research methods, I chose the qualitative method for this study. There are multiple designs for a qualitative study: (a) narrative research, (b) case study, (c) phenomenology, (d) ethnography, or (e) grounded theory. I will describe all possible qualitative studies choices and why I ultimately selected a phenomenological descriptive study design.

Narrative research. Narrative research is a form of research in which a researcher explores the meaning of participants' life stories (Gockel, 2013). The events are then put in chronological order to tell the story of one's life (Bruner 2004; Sarbin 1986). In this research, I was not focused on describing the lives of the managers; therefore, narrative research was not suited for the study.

Case study. Researchers first used case studies in the1800s (Nock, Michel, & Photos, 2008). According to Yin (2009), a case study is “an empirical inquiry that investigates a contemporary phenomenon in-depth and within its real-life context” (p. 19). A researcher uses a case study to study a person or situation while observing them in their nature environment. I could not use a case study for this research since the mergers studied necessarily took place in the past.

Ethnography. Kriyantono (2012) reported that ethnographic research focuses on participants’ perspectives of their lives in a specific culture or group. Researchers collect data through interviews and often live within the culture or group during data collection (Kriyantono, 2012; Lee & Broderick, 2007). Since I was focused on managers’ past experiences and not on their culture, ethnography was not a suitable design for this study.

Grounded theory. Strauss & Corbin (1998) noted that Glaser and Strauss first introduced grounded theory in 1967. Grounded theory is a research process in which a theory is created inductively through data collected from interviews with participants who have shared a lived experience (Corbin & Strauss, 2008; Glaser & Strauss, 1967; Leedy & Ormrod, 2009; Urquhart, Lehmann, & Myers, 2010; Lee & Broderick, 2007). Grounded theory researchers develop a new theory from the data collected (Miller & Salkind, 2002). The purpose of my research was to obtain knowledge on lived experiences of managers, not to create another theory from the collected data. As such, the grounded theory method was not appropriate for this study.

Phenomenology. Morse (1994) noted that Edmund Husserl is the founder of phenomenology research. The purpose of phenomenological inquiry is to research participants who have personally lived through a situation (Finlay, 2009; Moustakas, 1994; Taylor & Bogdan, 1998). This study design was best suited for my research because I sought to understand the personal experiences of managers who managed employees through a merger and the resources available to them.

Research design selection. I used a qualitative, phenomenological research methodology for this study. I designed semi structured interview questions to obtain the participants' perceptions of the phenomena that occurred while they managed employees through a merger. Data was collection through one-to-one interviews. The intent was to research the lived experiences of managers who managed employees through a merger. The phenomenological research method was the best design to conduct my research study.

Research questions. To conduct this research, I designed on one central question with three subquestions. The central question was: What is the scope of resources available from a manager's perceptions to manage employees through a merger? The interviews were conducted using open-ended questions for 14 managers of merged companies. To achieve a deeper understanding for the phenomenology descriptive study, additional research questions were:

1. What type of special resources or skills were you provided to help manage the employees through a merger? How did you utilize the resources?
2. Explain any events or situations that might have occurred resulting in you utilizing the resources or skills to improve the situation? What effects did it have on the employees?

3. What were the benefits for the employees when a manager is provided resources/skills to manage employees through a merger? What are the benefits for the managers? What are the benefits for the organization?

A qualitative phenomenological descriptive study was the best fit for the purpose of this study. Leedy and Ormrod (2010) described qualitative studies as interview driven. I used semi structured interviews in which I focused on the three fundamental questions above. The three questions were supported by 14 additional interview questions to help the participants describe their lived experiences.

The interviews were held face-to-face, via Skype, and by telephone. The interviews lasted no longer than 1 hour. I recorded all interviews using two recording devices: Autonotes2 and Amolto. This information was then transcribed into a Word document and crossed checked for accuracy. In the interviews, I focused on obtaining a better understanding of the participants’ lived experiences of managing employees and the resources available to help them through the process. Managers play a critical role when mergers are announced. I thus interviewed managers who had directly managed employees during the merger process. All data collected was then analyzed for trends and themes.

Role of the Researcher

The role of a researcher is collect, analyze, and interpret. It is also critical that I allowed the data collection to drive the study results to reduce any possible researcher bias. I have been in the oil and gas energy sector for over 25 years as a health, safety, and environment manager. Throughout these 25 years, there have been many mergers of organizations I have interacted with. In my role as a leader in a variety of companies, I have managed employees. I have been involved in one merger while I was a senior leader of a merger process. The merger process took place over a period of 2 years, however, I did not have the responsibility of selecting employees who were to be retained or released from the combined organization.

The participants for my study were managers, who met the selection criteria, chosen through the snowball sampling method. I conducted an initial purposeful sampling of participants that fit the study criteria, who then referred other potential candidates through their professional association. There were candidates that I worked with during my years in the role as a leader in the industry. To reduce my bias, I ensured that I did not have a current co-management relationship with any of the participants. I ensured the questions chosen would allow the participants to drive the content of the interviews. I also ensured I had not managed the participants throughout my career as a manager.

I was responsible for the development of the interview questions and ensuring the participants drove the content of the interviews. My relationship with participants remained focused on the interview content and responses to the research questions. The participants were assured that all information collected would remain confidential.

The role of a researcher is to ensure the protection of the participants and the data collected. All participants were required to sign an informed consent form before being interviewed, so the participants were informed of the purpose and intention of the study. All participants understood they had the option to withdraw at any time throughout the study with no negative consequences. During the research study, there was no intention of placing the participants in a risky situation. To ensure the participants were protected, all interviews were conducted in a neutral, private agreed upon meeting place and time. The interview was limited to one hour to reduce the inconvenience of possible meeting and travel time. I ensured the participants were comfortable and fully understood the interview process before, during, and after the interview.

Methodology

Participant Selection Logic

Phenomenological studies are based on participants that have lived through an event (Finlay, 2009; Moustakas, 1994; Taylor & Bogdan, 1998). These types of studies consist of interviews and observation of the participants who have lived through an experience of interest. Participants for this study were selected from mid-level managers who had worked in a North American corporation while a merger was taking place. Mid-level and front-line managers were excellent candidates for the study since they are the ones who give direction and have immediate contact with their employees. The purpose of preselection of participants was to ensure they were present when a merger was announced and continued to manage employees through the merger process. To qualify for this study, the participants were required to have directly managed employees while a merger was taking place at a corporation.

A qualitative research study uses fewer participants than a quantitative study. All qualitative literature reviewed in preparation for this study used a low number of participants. Wolff (2002) recommended eight to 12 participants, whereas Miller and

Salkind (2002) and Polit and Hungler (1999) both recommend 10 or fewer. To ensure data saturation, I conducted 14 interviews. According to Prendergast and Chan Hak, (2013), semi structured interviews should focus on information collected instead of a number of interviews to be conducted.

Purposive Sampling

The participants were chosen by using the snowball sampling method. Snowball sampling starts with selected participants that meet the study criteria. The participants then refer possible candidates that have a similar background. The participants in this study used a participant referral form (Appendix A). The referred participants then referred another potential participant. All participants were first contacted through a phone call or email to explain the reason I was contacting them. I then emailed a consent form to the participants. Those who were interested signed and scanned the form and sent it back to me. Once I received the signed form, I contacted the participants to arrange a mutual date, time, location and choice of interview style. The preference was to conduct face-to-face interviews; however other options possible were Skype or telephone interviews. I conducted one face to face interview, two through Skype and the other 11 interviews through telephone calls.

Confidentiality

I maintained confidentiality during the data collection and all information will remain confidential for the duration as required to be maintained for this research study. I protected participants' identities by assigning a numbered code to each participant. The participants' names were not included in the study. The data collected was stored under the participants' assigned codes. Shank (2002) discussed the need for all information collected for research studies to be in a controlled environment for the protection of the participant. DuBois, Beskow, Campbell, Dugosh, Festinger, Hartz, and Lidz, (2012) discussed the Institute of Research Board (IRB) is responsible for ensuring researchers are protecting all participants in the study.

I recorded all interviews and had those all transcribed to ensure accuracy. All written and recorded participant data was assigned to the participants' codes and will remain stored on my private OneDrive cloud folder with controlled access for a minimum of five years. My private OneDrive cloud is limited to only me having access. I stored the notes in a locked file cabinet and will shred five years after the study has been approved.

Instrumentation

Qualitative studies involve collecting data through observation, document collection, and interviews. I used a questionnaire to collect research data for this qualitative study. In this study, the data was collected by me through interviews. The interviews consisted of open-ended questions focused on collecting information to answer the research questions. The interviews were recorded through the AudioNote2 and Amolto.com applications and all notes were transcribed. All handwritten notes and uploaded recordings were cross checked for data accuracy. All equipment was checked before each interview to ensure it was in functioning order.

Once the information was collected, and transcribed, I entered it into the QSR NVivo 11 program and an Excel spreadsheet to analyze for common themes. The goal of the interviews was to get a better understanding of the lived experiences of the participants' involvement in managing employees through a merger. Holding the interviews in person allowed me to establish trust with the participants. Establishing trust was important for the participants to feel comfortable, allowing them to freely discuss their real life experiences of managing employees through a merger.

The QSR NVivo 11 program was developed to help a researcher to organize and analysis data collected through interviews. The program allows data to be coded and reorganized into themes noted from the collection of data. This instrument is a good tool to use for qualitative studies. An Excel spreadsheet also was used to enter the data and code for trends and themes. Both instruments allowed me to enter all collected data and analyze for trends and themes.

Procedures for Recruitment, Participation, and Data Collection

Participant protection is vital to the success of a study. The IRB controls all applications for a research study. No participants were contacted prior to IRB approval. Once I obtained IRB, approval number 06-23-17-0556120, I obtained possible candidate recommendations from industry colleagues. They recommended other colleagues they thought could be potential participants for the study. I excluded anyone I worked with, at the time of the study, from participating in the study. Participants who met the research criteria I contacted by email to see if they were interested in contributing to the research study. The snowball sampling method was used to obtain further participants. The first participants referred participants with similar backgrounds, and then the selection of further participants continued until 15 participants were identified for interviews. I emailed a consent form to the referred participants. The form contained all pertinent information to allow the participants to make a decision about whether to take part in the research or not. Once the consent forms were consolidated and 15 participants were available, the interviews were scheduled.

Fifteen participants allowed for saturation of information to be obtained for the research study. The participants were interviewed over a period of two months. I developed the interview questions and conducted the interviews myself.

Prior to the interviews being conducted, I developed the data collection criteria to include the following considerations (a) the questions were developed without bias (b) the questions were worded to allow the participants to answer all questions openly, and (c) each interview would last no longer than one hour.

I conducted the interviews in a mutually agreed private location to ensure to maintain confidentially. The beginning of the interview I reviewed the contents of the consent form and the purpose of the interview. DuBois, Beskow, Campbell, Dugosh, Festinger, Hartz, and Lidz, (2012) found that all participants must fully understand any risks associated with all research. The participants were reminded of the recording of the interviews through both AudioNote2 and Amolto. To help create a relaxing atmosphere and to establish rapport with the participants, I began the interview with some general information to ensure the participant met the study criteria. I then conducted a brief introduction and social interaction to allow the participant to feel comfortable. If at any time the interviewee had wanted to stop the interview, I would have stopped it immediately.

I remained neutral and did not contribute any thoughts or opinions during the interview with the participants. In the event follow up interviews were needed, both and the participant and myself agreed on the location and time of the interview. I did not require any follow up interviews.

Once the interviews are completed, I thanked the participants for their time and participation in the study. Once the interview notes were transcribed, the participants verified the notes for accuracy. I reminded them of the confidentially of the information collected.

I analyzed all the data collected for themes. This analysis was conducted using the QSR NVivo 11 program and an Excel spreadsheet with me identifying the common themes from the lived experiences of the participants. Saturation of information was needed to conduct the research study. If I had not collected an adequate sample size, my backup plan was to continue to reach out to other possible participants for more recommendations on possible participants until saturation was reached, however, saturation was achieved through the current population.

Data Analysis Plan

In phenomenological studies, the purpose of the research is to describe the phenomenon of the lived experiences of the participants (Finlay, 2009; Moustakas, 1994; Taylor & Bogdan, 1998). The participants in this study described their experience of managing employees through a merger. Following the research principles, I conducted the research seeking a deep description of the lived phenomenon from each participant. Data was collected from the participants through answering the interview questions. I protected all participants through the coding system mentioned in the participant protection section of this study. All recordings were transcribed and entered into the QSR NVivo 11 program and an Excel spreadsheet. Once I conducted all the interviews and they were transcribed, I then was able to analyze for trends and themes. The use of NVivo and an Excel spreadsheet fits the phenomenon study because it allowed me to group trends and themes gathered from the interview notes.

I recorded hand written notes to compile summary notes after each interview. The notes were dated and coded in corresponding participant's assigned codes. The purpose of the notes was to summarize the participant's interview and to link common themes with other participant interviews. I maintained the notes in a journal during the interviews and then kept the notes into a secure file cabinet. My research notes were used in conjunction with the data collected during the interviews to summarize my research findings.

Interview questions. The central question for the study was: What is the scope of resources available from a manager's perceptions to manage employees through a merger? To achieve a deeper understanding for this phenomenological descriptive study, three additional sub questions were used to explore the phenomenon of the central question:

1. What type of special resources or skills were you provided to help manage the employees through a merger? How did you utilize the resources?

2. Explain any events or situations that might have occurred resulting in you utilizing the resources or skills to improve the situation? What effects did it have on the employees?
3. What were the benefits for the employees when a manager is provided resources/skills to manage employees through a merger? What are the benefits for the managers? What are the benefits for the organization?

To ensure the central question to the research is answered, there were 14 open-ended phenomenological questions asked during the participant interviews. The questions that will be asked were:

Manager Responsibilities:

1. Please tell me your job responsibilities with the company that eventually merged?
2. How many employees did you manage as part of your day to day responsibilities and how would you describe your relationship with your employees before the merger was announced?
3. What type of special resources or skills have you taken or were provided to help manage employees?

Merger Announcement:

4. How were you notified about the merger of the organization you were working with? What communication methods were utilized to inform yourself and then the employees of the merger announcement?
5. How did the employees react to the announcement of the merger? What feeling did you witness among the employees?

6. Once the merger was announced, what type of special resources or skills did you have access to, to manage the employees through a merger?
7. Explain any events or situations that might have occurred resulting in you utilizing the resources or skills to manage the situation?
8. What skills or resources did you find made a different when trying to manage the employee through the merger process?
9. Did you notice any difference in the employees while the merger was taking place? What changes did you notice in the employees? How did the changes affect the employees?
10. What differences did you notice in your manager- employee relationship during the merger implementation?
11. Please describe any changes you witnessed by having resources available to you during the merger, to help manage the employees through the changing times of a merger?
12. Please describe any changes you witnessed from the employees, through the availability of using resources to manage them?
13. Please describe any benefits you witnessed for the organization?
14. What suggestions do you have for managers who manage employees during a merger, in the future?

Issues of Trustworthiness

Researchers need to make sure their research studies are credible, transferable, dependable and confirmable. To ensure my research study was in adherence to the four conditions, the following conditions were enforced throughout the duration of my study.

Credibility

Credibility is required to be established for all research so other researchers can ensure the research was conducted as per the required standards. Hays, Wood, Dahl, and Kirk-Jenkins, (2016) discussed that credibility is when a qualitative study is believable based on the information of how the research process was conducted. To ensure the credibility was established, I asked peers to conduct peer reviews on the notes and the interview data collected to ensure no bias was present in the notes. All data collected was conducted by me to ensure its uniformity. The transcribed data were also available to the participants to ensure data collected and transcribed was correct and accurate. Any discrepancies in the data collected were corrected in the notes and the NVivo program.

Transferability

Transferability is required as part of a study to help ensure the study can be transferred to other contexts. Hays, Wood, Dahl, and Kirk-Jenkins, (2016) discussed that transferability refers to the generalization of how the study is conducted including participants, location, and time. The participants in my study were managers who had direct supervisor of employees through a merger. There was no limitation of gender, age, type of merger, or industry.

I collected the data and entered it into the NVivo program and an Excel spreadsheet to analyze trends. Detailed interviews, ranging from 25 minutes up to an hour, were used to collect data that was then analyzed to discover patterns and trends. As information was collected, I entered the data into the NVivo database and continuously compared the information collected to the other information collected. To help reduce bias and maintain focus on purpose of the research study, I referred to the research questions to conduct the interviews.

Dependability

Dependability is when a study can be repeated by other researchers and yield similar results (Hays, Wood, Dahl, & Kirk-Jenkins, 2016). There are several ways a researcher can ensure dependability in a research study. LeCompte and Goetz (1982) discussed that to ensure dependability, the researcher should record all observations accurately during the interview. Eisenhardt (1989), Mitchell (1993), and Yin (1994) discussed that a researcher should conduct pilot studies. LeCompte and Goetz (1982) also discussed the use of peer reviews would help to ensure dependability.

My interview questions for this research were reviewed by the University of Walden dissertation committee and University Research Review (URR) to ensure they were free from bias and would obtain the data needed to answer the research question. All interviews were recorded using two recording devices. The data collected during the interviews was transcribed into a word document and organized into the NVivo program and an Excel spreadsheet. Observations of participant body language and facial expressions were observed and recorded immediately after each interview, where possible. Ryan-Nicholls and Will (2009) stated that triangulation could be obtained by using multiple methods to obtain data. In this research, both interviews and observations were used to obtain triangulation within my research study.

All participants' identities were protected by assigning a numeral code to each participant. All participants' interview data was locked in a controlled electronic file and stored in OneCloud storage. All written notes were transcribed into a controlled electronic file and the notes were then being stored in a locked file cabinet. Once the notes were transcribed and confirmed by the participants, they were scanned and uploaded into my OneCloud file.

Confirmability

Riege (2003) discussed that confirmability is when a researcher interprets the data in a logical manner while ensuring they remain impartial to the data collected. To ensure this was maintained, all participant identities remained confidential through the coding process discussed in this chapter. Bias is present in all research; however, I had peers review my notes to ensure bias does not enter into the transcribed notes. Hays, Wood, Dahl, and Kirk-Jenkins (2016) stated that confirmability is when all data collected from participants is transcribed without a researcher's bias of interpretation.

Ethical Procedures

Ethical issues are vital to consider in all research. Researchers need to ensure ethical protection is taken into consideration for all aspects of participant protection, data collection, and data storage. All protection methods for data and participant were approved by the IRB before the participants were contacted and the data collection commenced.

Consent approval. All participants were sent an informed consent form that contained all the information about the purpose of the study, the benefits of the study, the protection of participant identity, and data collected. I informed all participants of their option to withdrawn from the study at any point. Each participant was given a consent form to fill out and send back. Once the form was received, I then contacted them to arrange the method, location and time of the interview.

Participant protection. I treated all participants equally and assigned a coded number to protect their identities. The participant's name, associated code, and information are stored in a private locked file cabinet in my home office. A master list with participant information is stored in a separate file and maintained in an OneCloud account with restricted access.

I conducted the interviews where the participants chose, and all interviews were held in private. Confidentially was maintained throughout the study. Each interview was identified by the coded number, and no other identification was used in the interview instrument.

The recorded interviews did not include the participants' personal information. The interview started with the participant's coded number. All recorded interviews were transcribed into data notes containing only the coded identification of the participant. The transcribed notes will remain in my private file in the OneCloud until five years after the research study has been approved. During the five year storage time, the confidential transcribed interviews and the hand written notes will remain in my confidential files and OneCloud storage.

Participants had the option to withdraw from the study at any time before, during or after the research commenced. If at any time a participant chose to not participant in the study, the data collected would be erased from the data collection. The identity of the participants is and will be always remain confidential. No participants chose to withdraw from the study.

Summary

Conducting research has many important steps; however ensuring the study is conducted using the correct method allows me to explore the subject thoroughly. Research involves careful consideration of the type of study, how to conduct the study, and protection of all participants from any risks and exposure. As the researcher, I needed to ensure that all research conducted did not put the participants at risk of harm.

Careful consideration needs to go into all research studies. Chapter three reviewed all three research methods and explained why the qualitative method was best suited to obtain data for my research question. I then discussed the designs for a qualitative study: (a) narrative research (b) case study (c) phenomenology (d) ethnography or (e) grounded theory. Concluding with the reason why the phenomenological design was best suited for my research study.

This chapter then discussed the role of a researcher, participant selection, how the sampling selection was conducted, maintaining confidentially for the study, and the use of a questionnaire to complete the interviews. I then reviewed the 14 questions that were used to collect the data for my study. The chapter then discussed the procedures for recruitment, employee participation, data collection, and how the data will be analyzed. The NVivo program and an Excel spreadsheet, which was used to analysis all data collected, were reviewed.

I ended the chapter with a discussion of the categories of trustworthiness in research studies. The four topics of transferability, credibility, confirmability and dependability were discussed. Lastly, I discussed the ethical procedures regarding the protection the participants identify and how the information will be stored.

In chapter 4 I will review the demographics of the study, details of the data collection including number of participants, location of interview, and how the interviews were recorded. The details of the data analysis will include the specific codes, categories, and themes that will emerge from the data collected.

In conducting this study, I had to take into consideration all aspects mentioned in this chapter to ensure the study can be considered relevant and applied to further research in the management community and other applicable areas. This study may allow for great improvements in the management and organizational communities. Employees and managers will benefit from the improvements gained through manager-employee relationships during changing times. Managers within organizations will benefit from smoother transitions of mergers, less employee turnover, and reduction in cost. The business community will benefit by having a reduction in merger failures through improved management of people and systems.

Chapter 4: Results

The purpose of this phenomenological descriptive study was to understand the resources available to managers to manage employees during mergers. In this chapter, I present the themes and perceptions that emerged from 14 interviews conducted with managers who had direct management of employees during mergers of North American organizations.

I conducted the interviews in order to answering the primary research question: What is the scope of resources available from a manager's perception, to manage employees through a merger? This was answered with three research questions:

RQ1. What type of special resources or skills were you provided to help manage the employees through a merger? How did you utilize the resources?

RQ2. Explain any events or situations that might have occurred resulting in you utilizing the resources or skills to improve the situation? What effects did it have on the employees?

RQ3. What were the benefits for the employees when a manager is provided resources/skills to manage employees through a merger? What are the benefits for the managers? What are the benefits for the organization?

There were a total of 14 participants, included in my study, which provided information through private interviews. I gave all 14 the opportunity to answer open-ended questions, allowing for further input as needed. All participants were also given the opportunity to review all recorded interview notes and verify the data collected during the interview. The participants confirmed and approved the accuracy of all data collected on their lived experiences. The chapter is organized as a general review of the research setting, data collection, and participant demographics. The chapter concludes with the actual findings from the data I collected.

Research Setting

The data was collected from interviews of 14 managers who worked with a variety of North American companies that eventually merged or were involved in an acquisition. The managers all were responsible for the day-to-day management of employees. The criteria for inclusion in this study required participants to (a) be managers who worked in a supervisory position at the time a merger or acquisition was taking place, (b) have managed employees during the merger or acquisition implementation, and (c) not have a current direct working relationship with me to minimize any potential for perceived coercion. I emailed (Appendix C) possible participants who may have met the criteria, and then followed up with a consent form to fill out and send back to me. Once received, I contacted them through email to arrange the time, method, and location, when required, to conduct the interview. Interviews were conducted according to the schedule of the participant.

Once the interview was completed, I asked participants if they could recommend others who could meet the three inclusion criteria for the study. I then followed up with the participant referral form (Appendix A). Once I received a participant referral form, I contacted the referred participants with a consent form. If they agreed, the process continued until all participants were interviewed and saturation was achieved.

Demographics

I conducted the interviews through face to face interviews, via telephone calls and Skype. All interviews were recorded through two recording devices; Autonotes2 and Amolto. The interviews ranged from 25 minutes up to an hour.

Fourteen participants took part in the study. The study consisted of two female managers and 12 male managers. The participants held a wide range of management positions (Table 1). All managers were responsible for direct employees ranging from a minimum of two up to a maximum of 400 employees. The participants, while not directly asked, referred to at least one merger while a manager, but in several interviews, involvement in multiple mergers was mentioned.

Table 1

Participant Demographic Data

Participants	Gender	Title	Number of employees
Participant 1	Male	Human resources manager	12
Participant 2	Female	Director of environmental affairs	9
Participant 3	Male	Engineering manager	7
Participant 4	Male	Business development manager	2
Participant 5	Female	Manager of application developers and technical support	40
Participant 6	Male	Sales manager	32
Participant 7	Male	Senior manager	12
Participant 8	Male	Director	2
Participant 9	Male	District manager	15/20
Participant 10	Male	Marketing and operations manager	400
Participant 11	Male	Vice president	10
Participant 12	Male	Regional manager	70
Participant 13	Male	Engineering manager	15
Participant 14	Male	Vice president and general manager	140/100

Data Collection

Data were collected from 14 participants through planned 60-minute interviews. I collected resumes and reviewed profiles to ensure the participants should be included in the study. To be included the participants had to have managed employees when a merger was announced at the company in which they were employed. Once the potential participant met the study requirements, I conducted an interview through the preferred method chosen by the participant; telephone call, face to face interview or Skype. While 15 interviews were conducted, during one interview, I realized that there could be a conflict of interest; therefore, I eliminated the interview from the study, resulting in 14 participants for the study. Interviews were conducted in a variety of ways. One interview was conducted face to face in Canada, two through online Skype video calls, and all others through telephone calls. Most of the interviews were conducted while I was in a different time zone than the participants, therefore time consideration was a factor when booking the interviews. The interviews were conducted over a period of two months. I conducted all interviews in a method, time, and date that best suited the participant's schedule. All interviews were conducted in private atmospheres and private calls to maintain confidentially.

All interviews were recorded using two recording devices; Autonotes2 and Amolto. While the interviews were planned to be conducted using the Livescribe pen, hand notes were found to be more efficient for note taking. The interviews ranged from 25 minutes to 1 hour. Only three interviews involved facial and body visuals, therefore body and facial expressions recordings had very little bearing on study results.

Once the interviews were completed, I uploaded the recordings into OneCloud as m4a audio files. I then sent the files to a professional organization, which transcribed them into a Word document. Once I received this document, I checked the information for accuracy and sent it back to the participant to verify the content of the conversations recorded. All participants' comments and corrections were incorporated into the final interview notes. The participants were reminded of their right to withdraw from the study at any point at every point of contact. No participants asked to have their notes withdrawn.

I had originally intended to interview a minimum of 18-20 participants; however, once the study was in progress, only 15 interviews were conducted, one of which I eliminated because of a possible conflict of interest. While data saturation was established at around interview eight, participant's agreement to participate and the need to ensure saturation was reached encouraged me to continue until 14 interviews were completed.

I began the interviews by establishing rapport with the participants and continued by thanking all participants for taking part in my study. I then informed the participants of their voluntary participation in their commitment to the study, and offered details on the purpose of the recordings, the process to verify all the notes, and the purpose of the study including the main research question. I also reminded them that there was no compensation for taking part in the study.

I did not discuss any history of my past positions or involvement in mergers to ensure that no bias was introduced into the study. The focus of the interview was on information gathered from the participants in accordance with the interview questions (Appendix B). All data collected during the interviews was entered into NVivo and an Excel spreadsheet and then hand coded to allow for data analysis.

Data Analysis

This was a phenomenological descriptive study. Englander (2016) noted that phenomenological research is best suited for understanding issues with human science. According to Sousa (2014), researchers conduct descriptive-based phenomenological studies to describe, understand, and clarify human experiences. In this study, I researched the experiences of participants who lived through a merger and shared their personal experiences while managing employees through a merger. A phenomenological approach was appropriate for this study because it allowed me to collect data from participants who had firsthand experience in a merger and witnessed the effects, of the merger, on the employees they managed, the organization, and themselves as managers. All managers interviewed were present in the company when the merger was announced.

The interviews were conducted around the three primary research questions with additional supportive interview questions. (Appendix C) allowing for open-ended responses. The participants were encouraged to answer the questions on any or all of the mergers they experienced as managers. All participants were reminded of the confidentially of the interviews.

The data were collected and entered in NVivo 11 software to organize the interview results, allowing me to organize and analyze them for themes and trends. The data was also hand coded using an Excel spreadsheet to ensure validation of the data collected. The data while collected over a period of two months, it was not broken down into individual interviews, but the interview data was looked at as a whole.

One of the first steps was to ensure my personal bias or views remained neutral throughout the data collection and analysis stages. I reflected upon my personal experience as a manager while a merger was taking place, and put all my feelings and thoughts aside from this study. Putting aside my reflections allowed me to be open and accepting of the participants' personal experiences.

I began by listening to each recorded interview in an individual seating. This allowed me to relive the conversation with an open, objective view. Listening to the recordings multiple times allowed me to hear what the participants said and also to ensure there was no leading questions or bias introduced into the interview. Once the recordings were completed, I read the translated scripts to get an overall meaning of the interview, in relationship to the research questions.

Once all the recordings were listened to and read, I uploaded each transcribed interview data into the NVivo 11 programs. I then found key meanings or concepts that were in line with the research and supporting questions. I highlighted all meaning or concepts found and assigned it a code. Each code had its own reference of a short phrase of word. I repeated the process until all 14 transcribed interview notes were entered into NVivo.

Hand coding the interview notes was completed in a similarly manner. I used an excel spreadsheet to enter the answers to the questions. Once entered, I highlighted key comments and phrases that were pertinent to answering the interview questions.

The coded notes were then taken and broken down into categories. The categories were made up of a combination of nodes that were brought together to create an overall category. Once the categories were created, higher categorizations of themes were exposed. There were a total of seven themes that resulted from the study. The themes are:

1. The managers-employee relationships were maintained throughout the merger process.

2. Managers were not provided any resources to manage employees during the merger. However, there were resources or skills available within the organization and the management team.
3. Notification of the merger was different for both managers and employees.
4. Employees reacted differently to the announcement of the merger.
5. Situations that arose during the merger was handled more efficiently with resources.
6. Having resources available benefited employees, the managers, and the organizations.
7. Majority of participants were willing to pass on advice to future managers of mergers.

Further, in the chapter, the themes are discussed in detail. The themes help to support the findings of my study and answer the primary research question: What is the scope of resources available from a manager's perception, to manage employees through a merger?

Evidence of Trustworthiness

It is important to ensure all studies are believable and can be transferred to other studies. My study was conducted under the requirements of the International Review Board guidelines. I conducted the study myself to ensure all elements of trustworthiness were practiced throughout the study.

Credibility

Hays, Wood, Dahl, and Kirk-Jenkins, (2016) discussed that credibility is when a qualitative study is believable based on the information of how the research process was conducted. To ensure the credibility was established, I conducted all the interviews myself to ensure uniformity of all data collected. I took notes during the interviews and taped all interviews. Interviews were taped by using two devices; Autonote 2 and Amolto.

Once the interviews were conducted, I sent the taped interviews to a professional organization to be transcribed. Once I received the notes back, I compared the transcribed notes to the audio recorded interviews for accuracy. Any discrepancies were corrected and then the transcribed notes were forwarded to the participants to be verified. The participants checked all transcribed notes, corrected any errors and then confirmed the information transcribed was accurate. All data collected was transcribed into the NVivo program and Excel spreadsheet once it was verified by the participant.

Transferability

Transferability is required as part of a study to help ensure the study can be transferred to other studies. Hays, Wood, Dahl, and Kirk-Jenkins, (2016) referred to the generalization of how the study was conducted including participants, location, and time. To ensure transferability of the study when used by others, I provided a detailed analysis of the selection of the participants, recruitment of participants, how the data was collected, and how the information was verified to ensure the accuracy of the data collected. The participants in this study were managers that managed employees through a merger. The participants had no limitation to gender, age, and type of merger, or a number of direct employees in which the participants managed the employees through a merger. This study should be easily transferred to future studies in similar research area.

Dependability

Dependability is when a study can result in similar results among other researchers (Hays, Wood, Dahl, & Kirk-Jenkins, 2016). To ensure dependability in this study, I recorded all interviews by using two devices. All recordings were then transcribed by an independent company, and all transcribed notes were verified against the recordings. The participants also had an opportunity to review all transcribed notes. I provided a detailed collection of data, transcription, and verification of the data in the study. Most interviews, except for one face to face and two Skype video calls, all were conducted through telephone calls. Body language and facial expressions were very limited therefore they were not part of the research and will not influence the dependability of the study.

To guarantee dependability within the study, the participant's identity was protected by assigning a numeral codes. The participants were chosen by meeting the criteria outlined in the study and involve purposeful initial sampling of participants that fit the study criteria, who then referred other potential candidates through their professional association.

Confirmability

Riege (2003) discussed confirmability is when a researcher interprets the data in a logical manner while ensuring they remain impartial to the data collected. To ensure confirmability was maintained throughout the study, all participants identities were protected and assigned numerical codes. The identity of the participants will remain stored in a separate locked file cabinet.

Hays, Wood, Dahl, and Kirk-Jenkins, (2016) found confirmability is when all data collected from participants is transcribed without a researcher's bias of interpretation. To maintain confirmability, all data collected through the interview questions (Appendix B) was transcribed by an independent company and information confirmed by the participants. Once the transcribed data was reviewed and approved by the participants, the interview notes were stored into the NVivo database and continuously compared the information collected to the other information collected. An Excel spreadsheet was used to sort the responses to the interview questions in a similar manner.

Study Results

In this section I describe in detail the results of the data collected in reference to the interview questions asked of 14 participants. I presented the focus on the questions and the relationship to the themes that emerged from the interview data collected, not necessarily in order of importance.

Research Question 1

What type of special resources or skills was provided to help manage the employees through a merger? How did you utilize the resources?

Question one explored if any special resources or skills were provided to the managers to help manage the employees through the merger. Table 2 shows that 100% of the participants stated they were not provided any special resources or skills to manage the employees through the merger. Participants responded with comments such as “just internal stuff with the company, but I wouldn’t say specific to managing people” (Participant 4). Participant 8 responded, “I had the opportunity to take on a number of leadership courses, some of which has a managerial element, but I would say most of it emphasized leadership.” Other participants (Participant 1, 3, 7, 11, 12, and 13) responded with “No” to the interview question.

Theme two. Theme two uncovered that while participants were not provided any special resources or training to manage their employees during the merger, they had resources available through the organization along with their own experience. Forty-three percent of the participants stated they have some level of training related to management or other technical training. Table 2 also shows that 21% of the participants interviewed mentioned their own education as a resource that helped towards managing employees through a merger (Participants 1, 11, & 14). Participants responded with comments such as, “nothing provided to me. But I didn’t expect it either…I had a degree in business with a major in HR” (Participant 1). Participant 11 responded, “I finished my MBA a little while ago, which helped me maybe mature as a leader as much as anything.”

Seventy-nine percent of the participants stated there was a resource or multiple resources available (Table 2). Of the 79% of the population stating resources were available, the resources available to the managers were; Human Resources department (36%), information provided to them (36%), access to information on a website (36%), external teams assistance (18%), access to their leadership or manager (27%) and access to the other merging company (9%), (Table 3).

Table 3 outlined the percentage of participants that stated having a specific resource available against the total amount of participants. Three participants responded they did not have resources available to them. In comparison to the overall participants interviewed, 14 participants, they responded with having the following resources; Human Resources department (29%), information provided to them (29%), access to information on a website (29%), external teams assistance (14%), access to their leadership or manager (21%), and access to the other merging company (7%), and no resources (21%).

Theme five. The participants responded to using the resources available to them in different situations (Table 2). Some participants stated they used the resource to assist for talking points to their team, whereas other participants responded they utilized human resource personnel to help work through questions from the employees. Participant one responded, “So I created a cheat sheet for them of things they could say, things they should say, and basically said, put yourself in their shoes.” Participant six responded, “There was on the websites, there were talking points and scenarios on how to deal with, you could answer the question, and then they could call the HR people and talk to HR.” Other responded they relied on management to ask questions when needed. Participant 13 responded, “. The CEO was very approachable and was always open for employees to ask questions.” The resources that were available, the managers utilized to help manage the situations that arose among the team.

Table 2

Participant Managerial Experience and Resources Available

Participants	Participant response to resources taken or provided to manage employees	Resources available within the organization
Participant 1	Nothing/HR degree	Human resources manager/cheat sheet provided
Participant 2	Management courses	Communication talking points
Participant 3	Nothing from the company	Human resources
Participant 4	Managing processes not people courses	Website
Participant 5	Technical training but no management training	Human resource/organizational change management team
Participant 6	Very little	Human resources, websites, and leadership
Participant 7	No	Nothing provided
Participant 8	Classic management courses	Supervisor
Participant 9	Nothing was provided	No resources
Participant 10	Management training	Information packages
Participant 11	No/MBA	Integration team
Participant 12	No	Nothing provided
Participant 13	No	Information provided on intranet/Senior management
Participant 14	Some administrative training/previous experience	Senior management presentations/access to other company

Table 3

Type of Resources Available within Organizations

Type of Resource	Participant responded having resource available	Percentage of participants that responded to having resource available (79%/11 participants)	Percentage of participants that responded to having resource available against overall participants
Human Resource	1, 3, 5, 6,	36%	29%
Information provided	1, 2, 10,14	36%	29%
Website/Intranet	4, 6, 11,13	36%	29%
External team	5, 11,	18%	14%
Leadership/manager	6, 8, 13	27%	21%
Access to other company	14	9%	7%
No resource	7, 9, 12	27%	21%

Research Question 2

Explain any events or situations that might have occurred resulting in you utilizing the resources or skills to improve the situation? What effects did it have on the employees?

Question two explored any possible events or situations that may have arisen while managing the employees, resulting in utilizing any resources or skills that they had access to. According to the participant responses, (Table 4), 43% had situations that occurred that were handled with resources available. Participant ten stated, “There were situations that came up that I think are somewhat unusual or abnormal where when you had entire crews walk out and go work for a competitor.” Participant five responded, “each department would have its own set of angst over the merger…We didn’t expect them to come to us with their fears and concerns, and they did.” Another participant responded, “Some cultural differences arose” (Participant 14).

Theme five and six. The participants that had resources available to them responded positively in regards to having resources available to handle a situation when one occurred. When situations arose, the managers utilized the resources they had available to them to address the issues. The effects of having some availability of resources resulted in a variety of responses. Theme five (Table 4) and six (Table 5) both referred to situations running smoother and benefits for the employees.

Participant one had created a cheat sheet (Table 2) to handle situations or questions that had arisen and when asked, responded, “I think that the merger went quite smoothly. I think it'd be way more smooth than if I hadn't done it.”

> If you had that experience that helps… And then you have people that had been through mergers before; they can answer questions. And we all have that group that we're connected to that's been through several mergers. Especially if you've been around as long as I have. (Participant six)

“Communication is the number one skillset” (Participant 9). Participant 11 responded, “Oh, it was great. You know, what they tried to do is they tried to keep as more questions came up and as they were able to release more information, they kept it pretty fresh.”

Table 4

Employee Situation and Resource Management Effects on Employees

Participants	Managing situations/events with resources	Resources effectiveness
Participant 1	No problems	Merger went quite smoothly
Participant 2	Handled all issues with standing monthly agenda topic	Follow through on commitments
Participant 3	Human resources managed all	Resources only used on people that left the company
Participant 4	No situation	NA
Participant 5	Each department had its own angst against the departments- fear of adapting new systems	Background skills helped
Participant 6	No real issues	My experience helped
Participant 7	No situations	NA
Participant 8	Questions from employees	Discuss with boss
Participant 9	No situations	Communication helped
Participant 10	Questions/Entire crews walk out	Communicate effectively
Participant 11	No situation	NA
Participant 12	No situation	NA
Participant 13	No situation	NA
Participant 14	Cultural differences	Sharing information helped

Research Question 3

What were the benefits for the employees when a manager is provided resources/skills to manage employees through a merger? What are the benefits for the managers? What are the benefits for the organization?

Question three explored the benefits to employees, managers and the organization when resources or skills are available during a merger process. According to the majority of the participant responses, there are benefits in all three areas (Table 5). Even in some situations where the participants stated there were no resources provided, they discussed benefits to one or more of the three groups.

Theme five and six. Theme five and six related to research question three. Seventy-nine percent of the participants responded with positive benefits to the employees when resources or skills are available to the managers. Seven percent of the participants (Participant 1) stated "I don't think the employees would've known. I think they would just saw their manager doing whatever they were doing and wouldn't know any better." Fourteen percent of the participants (participant 4, 12) stated there were no benefits as they also stated there were no resources or skills provided for managing employees through the merger (Table 2).

Twelve participants responded positively and stated the benefits to employees of having resources or skills available to the manager. Participant six responded, "They were a little more calm." Participant 10 responded that "they sense that there's a strong presence at the helm, and that you're part of a flow of information and direction." Other comments were, "helped to put people at ease" (Participant 8) and "gained a certain amount of confidence in the new organization (Participant 11)."

Twelve participants (86%) discussed the benefits to managers when resources or skills were available. Two participants (Participants 4, 12) did not see any benefits for themselves as managers because they also stated there were no resources or skills available to them. One participant responded with "Communications I think was helpful and I think that gave me the opportunity to follow through on what my plans already" (Participant 2).

"The people that worked for me knew that I had a good relationship with those people. So when I would convey a message back down, down to the troops, they knew that it was, it has some merits and should do it" (Participant 7)

Participant 14 "Stated you could answer employee's questions."

Table five also captured the responses from the participants in regards to benefits to benefits to the organization. Twelve participants (86%) responded with their experience of having resources available in relationship to beneficial to the organization. Participant one responded, "The mergers were very smooth, and very little disruption." Other participants stated, "We continued to maintain a high level of productivity" (Participant 5) and "Some new thinking, new ideas" (Participants 3). Participant eleven responded with, "I would say more employee confidence and positive aspects of the culture."

Table 5

Benefits for Employees, Managers and the Organization When Resources were Available

Participants	Benefits to employees	Benefits to managers	Benefits to organizations
Participant 1	Employees would not have known	Self-learning	Smooth and less disruption
Participant 2	Maintain their sense of direction	Communicate with the employees	Kept people sane
Participant 3	Resources available when they were released	Learned a lot	New thinking and new ideas, senior managers can handle situations better
Participant 4	No benefits for the employees	NA	NA
Participant 5	Remained productive, brought team closer	Employee retention and employees were focused on tasks	Maintain high levels of productivity, continue steady state
Participant 6	Calm employees	Being able to give more information to staff	Retain people, keep customers satisfied by providing products and services and more resources
Participant 7	More comfortable about the information	Relationship with senior manager	Good trusting relationships among managers
Participant 8	People at ease, assured people	Able to communicate with their employees	Send the message "we care about you"
Participant 9	Open communication	Having Human resources available Informing employees that the world is not turning upside down	Help informing employees that the world is not turning upside down,
Participant 10	Felt more confident with a strong presence at the helm, more secure	Made it easier to communicate information with the employees	Provided practical answers to employees, more organization, generating work
Participant 11	Gained confidence in the new organization	Having plans to provide people with information	Employee confidence and positive aspects to the culture
Participant 12	NA	NA	NA
Participant 13	People use it, look at it and ask questions	Communication increased	Communicate effectively Employees get back to
Participant 14	Happy to get the information	Communicate information with employees	work sooner

General Themes

There were four general themes, outlined in the list of seven themes (Page 97). The themes 1, 3, 4, and 7 that emerged from the study that is worth mentioning. The themes are 1) the managers-employee relationships were maintained throughout the merger process, 3) notification of the merger was different for both managers and employees, 4) employees reacted differently to the announcement of the merger, and 7) majority of participants were willing to pass on advice to future managers of mergers. While the themes were not the focus of the study, I feel the information can help benefit future studies related to merger activity surrounding managers and employees.

Theme One

One hundred percent of the participants revealed that they had an excellent relationship with all of their employees before the merger announcement (Table 6). Participants described the relationships with comments such as “Very good. Helpful. Good communication between us” (Participant 4), “Strong collaborative culture” (Participant 5), and “We had a good work relationship. I think we had open, honest lines of communications” (Participant 8). Once the merger was announcement, 93% of the participants stated that their relationship remained the same. Participant 12 stated there was a change, “Yes, a big change. Employees realized I was leaving and got frustrated”.

Table 6

Manager and Employee Relationship Before and After Merger

Participants	Manager-employee relationship before the merger announcement	Manager-employee relationship after the merger announcement
Participant 1	It was great	Remained same but communication increased among the team
Participant 2	Everyone was comfortable knowing the direction of the team	Yes I tried to maintain the relationship
Participant 3	Professional, open and inclusive	No difference in relationship
Participant 4	Very good. Helpful. Good communication between us	Nothing in my direct reports, however access to my manager was limited because he was tied up
Participant 5	Strong, collaborative culture	Same boss, very open and transparent
Participant 6	Fantastic	Same relationship
Participant 7	It was good	There wasn't much change
Participant 8	Good working relationship	We still communicated in an open honest mechanism method
Participant 9	Good to excellent	Yes the same
Participant 10	I have always been hands on	It changed to more interaction with your employees
Participant 11	It was open and easy	A positive change, they would want to engage and talk a little bit
Participant 12	Very good relationships	Yes, a big change. Employees realized I was leaving and got frustrated
Participant 13	Collegial, open, fairly close team overall.	No change in my relationship with the employees
Participant 14	Good	Good relationship, however my interaction with them increased for information sharing

Theme Three

Notification of the merger varied between participants. The method used to notify the managers was not always the same as the employees (Table 7 and 8). Thirty-six percent of the respondents stated they first heard of the merger through the public media (Participant 2, 9, 10, 11, &14). Participant two responded, “There was a news leak.” Twenty-nine percent of the respondents stated they found out in a face to face method, varying between individual face to face meetings with their supervisor, or a meeting where they brought a group together (Participants 3, 5, 8 & 13). Participant eight responded, “Our direct line managers told us face to face.”

Twenty-one percent were notified through an internal email or memo (Participants 4, 6 & 7). Participant six responded, “Through an internal memo.” Seven percent responded that the manager called a group meeting with all the managers to inform them of the merger announcement (Participant 12). Participant one (seven percent) responded, “I knew what was happening from day one.”

The participants responded that the employees involved in mergers did not necessarily hear about the merger announcement in a similar manner as themselves. Thirty-six percent of the respondents stated the employees first heard of the merger through the public media, as they did themselves (Participant 2, 9, 10, 11, &14). Twenty-nine percent of the respondents stated that they held meetings with the employees, through team meetings, public town halls (Participants 1, 4, 5, & 13). Participant 13 responded, “Officially there were town hall meetings.” Twenty-one percent were notified through an internal email (Participants 6, 7 and 12). Participant 12 responded, “It was a phone call to managers and then the general email to all staff." Participant six responded, "So after the initial contact and the email that was sent out." Seven percent (Participant eight) responded, "A similar exercise the next day....similar meetings with the direct line reports and then a global video conference.

One participant (7%) of participants responded;

> That was done face-to-face as best I could. Some people were away, but we tried to communicate with them. Some people are on vacation out of the office for personal reasons and so we tried to make sure they were aware." (Participant 3)

Employees were contacted but the method varied, depending on the merging company's method of choice.

Table 7

Participant Notification of the Merger

Participants	Notification method for managers	Notification method for employees
Participant 1	Employee owned, part of the process	Face to face/shareholder meeting
Participant 2	News leak	News leak
Participant 3	Face to face	Personal calls from the manager and then a communication email
Participant 4	Internal email,	Face to face
Participant 5	Face to face	Face to face
Participant 6	Internal memo	Email and town halls
Participant 7	Email	Email
Participant 8	Group meeting	Global conference call
Participant 9	Media	Media
Participant 10	Media	Media
Participant 11	Media	Media
Participant 12	Group phone call for managers	Email
Participant 13	Town hall meeting	Town hall meeting
Participant 14	Media	Media

Table 8

Method of Notification

Method	Participant response to manager notification	Percentage of managers notified by method	Participant response to employee notification	Percentage of employees notified by method
Media	2, 9, 10, 11, 14	36%	2, 9, 10, 11, 14	36%
Face to face	3, 5, 8, 13	29%		
Internal email or memo	4, 6 & 7	21%	6, 7,12	21%
Team meetings, town hall			1, 4, 5, 13	29%
Global conference call			8	7%
Personal call			3	7%
Manager group meeting	1	7%		
Personally involved	12	7%		

Theme Four

The announcement of a merger saw different reactions among the employees. While the media notification to the employees and managers may have varied, the employee's response to the merger announcement equally varied (Table 9 and 10).

Emotions that were stated to have been witnessed, once the merger was announced was trepidation, fear, nervous, and concern. Fifty percent responded that the employees felt concern for their jobs, fear of the unknown and losing their jobs, and skepticism, along with a combination of multiple feelings about the whole merger. Participant three responded, "Everyone was nervous of course because they didn't know whether or not someone might be coming in to take their job." Participant seven responded with, "there was a lot of skepticism and fear, obviously, of the unknown, and change." Participant five responded, "a lot of fear and skepticism, because what we were hearing about the other company was their culture was completely different from ours, and we knew that our culture was unique. Fear of losing jobs."

Twenty-one percent of the employees were excited and had a feeling of belief. Participant one responded, "They were happy to be bought by a Canadian company." Participant eleven responded, "They were very excited about it."

Fourteen percent of the participants stated the employees were in shock and somewhat numb about the announcement. Participant eight responded, "A little shock…. All those kinds of things, and then I think people who were just naturally a little more settled, a lot of curiosity, and a lot of wanting to know what about the path forward." Participant 13 responded stating the employees expressed uncertainty in their job and their benefits." "Uncertainty is certainly the feeling that people exhibited…. They have more questions that they expect, what about my benefits, are there layoffs, or any like that."

Seven percent of the participants expressed that the employees were more curious about the new company. "I guess, probably, they were certainly curious about what the new company, the acquiring company was all about (Participant 14).

Table 9

Emotions Expressed by Employees

Participants	Employee response to merger
Participant 1	They were happy to be bought by a Canadian company
Participant 2	A lot of concern
Participant 3	Nervous
Participant 4	A lot of Trepidation
Participant 5	Fear and skepticism
Participant 6	Fearful of losing their jobs
Participant 7	Lot of skepticism and fear
Participant 8	A little shock
Participant 9	Trepidation
Participant 10	A certain amount of relief
Participant 11	Excited about it
Participant 12	Somewhat numb
Participant 13	Uncertainty
Participant 14	Curious

Table 10

Reactions to the Merger Announcement

Emotion	Participant response	Percentage of participants response
Trepidation, fear, skepticism, nervous, and concern	2, 3,4, 5, 6, 7, 9	50%
Excited and relieved	1, 10, 11	21.5%
Shock and numb/uncertainty	8, 12, 13	21.5%
Curious	14	7%

Theme Seven

All participants had the advice to pass onto future managers who manage employees in a merger. The advice varied from participant to participant (Table 11 and

12). Fifty percent of the participants responded that communication is important for all managers to exercise when dealing with employees going through a merger (Participants 2, 3, 4, 9, 10, 11, &12). Participant three responded, “Be open and honest. Tell them what you can. If they ask questions that you might have answers for but it's not public, you can't put it out there.” Participants two, four, 10 and 11 all directly responded with, “Communication.”

Twenty-nine percent (Participants 1, 6, 7, & 8) encouraged engagement with the employees. Participant seven responded, “Engage employees, stay on top of negatively, and stay on top of the stress levels that people have.” Participant one responded, “Listen to your employees and what is happening.”

Fourteen percent stated that the employees needed to be understood and checked in on (Participant 2 & 8). Participant two stated, “Even if you feel like you've given them the opportunity and to check in, some people need less than others as far as communication and meetings with you, some people need more time than others among your employees.” Participant eight responded, “I think the most important thing is to understand on an employee by employee basis what their concerns are, what their particular needs are, because everybody is different. Everybody is in a different spot.”

The remainder of the participants has individual suggestions (seven percent each). Each had suggestions to share from their personal experience. Participant 14 responded, “I think give the employees as much notice as possible of what's happening, and have opportunities to learn about the company as early as possible.” Participant 13 responded, "My experience is that employees during an acquisition are actually ready for change and are open for change and expect certain things to change."

Table 11

Manager Advice to Future Managers Involved in Mergers

Participants	Advice to future managers during mergers
Participant 1	Don’t promise anything you can’t deliver. Listen to your employees and what happening
Participant 2	Even if you feel like you've given them the opportunity and to check in, some people need less than others communication and meetings with you, some people need more time than others among your employees
Participant 3	Be open and honest. Tell them what you can
Participant 4	Communication
Participant 5	Stay calm
Participant 6	Engage them positively, enthusiastically
Participant 7	Engage employees, stay on top of negatively, stay on top of the stress levels that people have
Participant 8	Understand on an employee by employee basis what their concerns are
Participant 9	Being straightforward and honest with the staff
Participant 10	Communication is everything
Participant 11	Communication
Participant 12	Don't keep even managers in the dark about what's going to happen
Participant 13	My experience is that employees during an acquisition are actually ready for change and are open for change and expect certain things to change
Participant 14	Give the employees as much notice as possible

Table 12

Future Manager Advice

Advice for Future Managers	Participant response	Percentage of participants response
Communication	2*3,4,9,10,11,12	50%
Check in often	2*, 8*	14%
Engage	1*,6,7,8*	29%
Don’t make promises	1*	7%
Be open to change	13	7%
Calm	5	7%
Give advance notice	14	7%

*Combined with other responses

Summary

This chapter presented the findings of the study through analysis of data obtained from lived experiences of 14 managers, that managed employees through a merger while working for a North American based company. My research was conducted through face to face, Skype and telephone calls. All interviews were recorded using two recorders and then were transcribed verbatim. The transcribed data was verified by the participants to ensure accuracy of the data.

The overall research was guided by the central question for the study: What is the scope of resources available from a manager’s perception, to manage employees through a merger? The three primary research questions helped to understand what resources were available to the managers during the merger process. I used the questions to explore situations that had occurred and were managed through available resources, along with the benefits of resources to employees, managers and organizations.

Through rigorous data analysis, seven qualitative themes emerged 1) the managers-employee relationships were maintained throughout the merger process, 2) managers were not provided any resources to manage employees during the merger, however there were resources or skills available within the organization and the management team, 3) notification of the merger was different for both managers and employees 4) employees reacted differently to the announcement of the merger, 5) situations that arose during the merger, was handled more efficiently with resources, 6) having resources available benefited employees, the managers and the organizations, and 7) majority of participants were willing to pass on advice to future managers of mergers. Trustworthiness was maintained throughout the study through credibility, transferability, dependability, and confirmability.

In chapter 5, I presented my interpretation of the findings from the analyzed data. I begin the chapter with reviewing the purpose and nature of my study and why it was conducted. I then interpret my findings, based from analyzed data collected from the interview questions. I conclude the chapter with a review of the limitations, recommendations for future research and social change implications.

Chapter 5: Discussion, Conclusions, and Recommendations

The purpose of this phenomenological descriptive study was to understand the resources available to managers to manage employees during mergers. The participants were required to have direct reporting of employees while working at an organization when a merger was announced so they could share their personal experiences of managing through a merger. According to Sousa (2014), researchers conduct descriptive-based phenomenological studies to describe, understand, and clarify human experiences. A phenomenology study was appropriate for this study because I collected data from the experiences of the participants while they managed employees through a merger. Specifically, I explored the availability of resources provided to managers to help them manage employees through a merger. I also explored resource effectiveness when situations arise and the benefits of having resources available to employees, managers, and organizations.

I gathered information from 14 managers who participated in semi structured private interviews answering a minimum of 14 open-ended interview questions. All managers had directly managed employees through at least one merger. Data was gathered in one-on-one private interviews, transcribed, reviewed for accuracy, and then analyzed for codes, categories and themes.

Findings from my analysis of the data highlighted several themes that I used to answer the overall research question: (a) the managers-employee relationships were maintained throughout the merger process; (b) managers were not provided any resources to manage employees during the merger, however there were resources or skills available within the organization and the management team; (c) notification of the merger was different for both managers and employees; (d) employees reacted differently to the announcement of the merger; (e) situations that arose during the merger were handled more efficiently with resources; (f) having resources available benefited employees, the managers, and the organizations; and (g) a majority of participants were willing to pass on advice to future managers of mergers. The remaining sections of this chapter include an interpretation of the findings, limitations of the study, recommendations, and implications for social change.

Interpretation of Findings

The conceptual framework for the study was based on Greenleaf's servant leadership theory (1977) and Herzberg's two factor theory (1968). The results of this study supported both theories. According to Greenleaf (1959), managers need to continuously improve themselves to have the ability to develop their subordinates. The findings in the study showed that managers took it upon themselves to educate themselves or advance their education to work in their functional role as a manager. Spears (2010) and van Dierendonck and Nuijten (2011) found that a servant leader has the ability to listen, be aware of individual's feelings, and have empathy when dealing with people. In this study, I likewise found that the practice of servant leadership had a positive impact on organizational commitment.

Herzberg's two factors of motivation and hygiene played a role when the merger was announced. The motivators that contribute to the employees having job satisfaction include employee achievement, recognition, employee growth, and responsibility

(Herzberg, 1968), and the dis-satisfiers were company policies and administrative practices, supervision, interpersonal relationships, working conditions, and salary.

Participants reported using their experience, their management team, and the resources they had available to them to ensure employees were not dissatisfied when the merger was taking place. Managers maintained good working relationship throughout the merger. Managers also increased their communication with employees so that all concerns and questions were addressed. Herzberg (1968) mentioned that managers play a significant role in helping employees achieve job satisfaction. The results of the study support Herzberg's theory when a merger is taking place.

Mergers can change the environment and expectations of both the employees and managers. My interpretation derives from the data collected, with the focus on answering the three research questions and ultimately concluding answering my research question: What is the scope of resources available from a manager's perceptions to manage employees through a merger?

Research Question One

What type of special resources or skills were you provided to help manage the employees through a merger? How did you utilize the resources?

While exploring the types of resources or skills provided to the managers to help them manage the employees through the merger, I found that, in the managers' perceptions, nothing was provided for the purpose of managing the employees through the merger. All of the participants stated that they did not receive special resources or skills to manage the employees through the merger process. However, while managers were not provided specific resources or skills to assist with the management of their direct employees, they did have access to resources. The common resources available to most participants were their past personal experiences of working through a merger, prepared packages, human resources departments, and their management teams.

Participants discussed their personal background in regards to education and in-house management courses. Managers had worked their way into management positions while taking different management courses along the way. While the courses were not specifically focused on managing employees, the courses did provide resources and skills with the focus of helping managers in their functional roles.

Some managers entered the workforce with a degree or decided to go back to school once in a manager's position. The managers obtained the degree to help provide them with the skills needed to fulfill the functions as a manager, including personnel management. The participants responded they made a choice to gain the education to help themselves in their position. Education can open the doors for advancement within organizations. When the merger was announced, human resources personnel played a large role in assisting managers with employee issues, answering questions, preparing standard packages, and updating websites with information. Human resources personnel can be a resource for the management team through all phases of the merger integration (Podgorski & Sherwood, 2015). The human resource department was a strong resource that managers relied on for most employee-related issues. While most managers did not consider human resources personnel a resource, when asked if they had access to resources or skills, human resources personnel was one of the largest resources available to managers to deal with situations.

Less than half of the participants responded to situations that arose with employees during the merger. In the situations that did occur, managers relied on the resources that were in place and their own experience to deal with the issues. In most cases, the managers engaged more often with the employees to ensure employees were informed about the latest events of the merger. Managers maintained excellent relationships with their employees throughout the merger. Benton and Austin (2010) found that communication during a merger can reduce stress and increase trust for employees. When situations occurred, the managers took it upon themselves to ensure the employees' questions were addressed or reached out to the human resources personnel for answers.

Managers found themselves drawing on their personal experience or those of their colleagues. All managers had been through a merger before; they discussed the impact of the overall merger process on all employees. They felt a personal responsibility to ensure the employees had answers; therefore the managers helped the employees alleviate their fears by staying closely connected with the employees and ensuring the employees' questions and fears were addressed. When situations occurred that the managers were unsure of, they reached out to colleagues to seek advice on how to handle the situation.

Research Question Two

Explain any events or situations that might have occurred resulting in you utilizing the resources or skills to improve the situation? What effects did it have on the employees?

Half of the participants reported that situations occurred where they had to use resources to assist with the situation. The situations were mostly employees wanting to know their fate within the newly formed organization. When the mergers were announced, there were plenty of unanswered questions. Employees wanted to know how the changes would impact them. The managers utilized their personal experience and communication skills with employees on a regular basis. According to Roundy (2010), leaders need to communicate all information during a merger. Communication of known information is very beneficial for the employees. The employees received the information as soon as the manager was able to share it, allowing the employees to remain calm and focus back on their jobs. The personal experience of the managers allowed each situation to be dealt with quickly. Managers were able to sympathize with employees because they had experienced the impacts of a merger, and they used the resources needed to quickly diminish any situations that came about.

The employees depended on their managers to give them the answers to their questions. The managers personally worked with the employees to help solve any outstanding issues. The manager's experience, relationship with the employee, and access to company resources allowed the employees to have some piece of mind. This allowed the employees to continue to focus on their job while knowing their manager sought out answers to their questions.

Research Question Three

What were the benefits for the employees when a manager is provided resources/skills to manage employees through a merger? What are the benefits for the managers? What are the benefits for the organization?

Resources were available to most of the participants during the merger. The managers heavily relied on their management team and personal experience. Human resources personnel were utilized for answering questions and informing the employees of any program changes and to help employees that were leaving the organization.

The managers relied on personal experience and relationships to communicate regularly with the employees as information were available. The managers maintained personal accountability in helping the employees work through the merger. The employees seem to view their managers as a reliable resource.

Employees, managers and the operation of the organization benefited from having resources available to manage any situation that arose during the merger. The employees had the support of their manager, who in turn utilized their surrounding management members and personal experience to help coach the employees. The employees continued to have trust in their manager; therefore remaining productive, calm and focused on their tasks. When employees needed questions answered, they would go to their manager for answers. Open communication and information exchange is critical during a merger

(Bansal, 2015; Birkinshaw, Bresman, & Håkanson, 2000). The employees entrusted their supervisors to be honest and look out for their best interest.

Managers also benefited from having resources available. Communication with employees increased because the employees had a lot of questions that required answers. The manager's facetime with the employees increased during the merger. The managers were able to give the employees current up to date answers, allowing the employees to feel a sense of ease and remain focus on their tasks. Having the resources available allowed the managers to have a sense of helping the employees understand the direction of what their future may look like.

The managers and the employees maintained open communication allowing the employees to remain focused and on task. Having the employees remain on task reduced employee issues that may rise from a change introduced within the team, and allow the manager to focus their time on understanding the impacts the merger may have on their team.

Managing employees resulted in many benefits in maintaining the operation of the organization. The managers managed the day to day employees concerns, therefore keeping the employees focused on meeting deadlines and targets. The employees remained productive, keeping internal and external customers satisfied and resulted in very little disruption to the daily business. Because the managers were able to maintain open, trusting relationship, all issues were dealt quickly allowing employees to get back to work in a shorter time.

Limitations of the Study

As described in chapter four, every effort was made to ensure the accuracy and trustworthiness of the data collected during the interviews. The objective of my study was to determine if resources were available to managers to manage the employees through a merger. There were five limitations.

The first limitation was the sample size of participants of the study. The data was collected from the lived experiences of 14 managers managing employees through a merger; therefore it cannot be representative of all managers involved in managing employees through a merger.

The second limitation was the resources available to individual managers while managing employees through a merger. Depending on the merging companies, resource availability may vary from merger to merger. I based my study on the resources the managers had available while managing through the merger they were involved in.

Third, the participants I interviewed may have had access to limited resources to assist them in managing the employees through a merger. Managers identified resources available to them at the time of the interview; they may not have had access or been aware of other possible resources.

The fourth limitation was the data analysis. I entered the data into the NVivo program and an excel sheet. The qualitative data analysis was limited to the QSR NVivo 11 program and the data I entered from the collection of the interviews. I analyzed the information entered into the system by using application of the program, to develop themes from the research.

Researcher bias is considered the fifth limitation. However, recording and transcribing the data collected verbatim reduced the possibility of any biases. The participants verified all notes transcribed to ensure accuracy.

Recommendations

Resource availability is dependent on the organizations in which mergers are taking place. Managers require utilizing their skills to manage the employees through daily activities and changing times. During time of change, managers having access to resources to manage situations and employees are very beneficial. As merging organizations try to integrate multiple culture and systems, employees can be the most susceptible to risk.

The purpose of my study was to explore resources available to managers to manage employees through a merger. Several new themes evolved from the data collected. The themes can be utilized for foundational groundwork towards future studies in the management and business merger fields. The first recommendation is to conduct a quantitative study, on a larger sample of managers involved in mergers, to examine the variety of resources utilized to manage employees through a merger. This will allow for managers from a variety of industries and geographic regions to be included in the study.

A second recommendation would be to explore manager experience level and the impact it may have on managing employees through mergers. The study revealed that managers relied heavily on their personal experience and other manager team members. Conducting a mixed method study, with the focus on levels of experience and the impacts of managing employees through change, would help to understand if manager experience makes a difference when managing employees through change.

Implications

An organization merger can be announced at any stage of a manager or employees career. According to Choi, Chung, and Du (2014) employees behave differently once a merger has been announced. Employees often change their work practices when a change is introduced. While the organization's manager is trying to manage the merger, the employees are left wondering, what happens to me? Significant changes to work environment result in negatively affecting work productivity (Duffield, Kearin, Johnston, & Leonard, 2007). The employees are seeking answers to the unknown and heavily rely on their manager to have answers to their questions. Employees can lose interest in the unknown and choice to seek out employment elsewhere.

The results of this study can help to contribute positively to social change for employees, managers, organizations and the business community. Mergers affect the stakeholders, managers, employees, and the families of these individuals (Angwin & Meadows, 2015). Understanding the resources available to manage employees through mergers allows managers to choose a resource that can help manage the individual needs of the employees.

My study provides managers with an understanding of what resources are available. My study also identified the benefits of having resources available when managing employees through a merger. Results from this study indicate that there are multiple resources available for managers. It also indicated that the utilization of resources helped the employees with the transition during times of change. Managers who utilize the resources can help address losses in motivation, productivity, absentness, and job satisfaction and employees turnover.

My study also allows organizational leadership to understand the importance of the manager- employee relationships during mergers, and the need to ensure resources are availability. It also allows human resources personnel to understand the importance of open communication and having answers readily available for the managers to share with their teams, when a merger is taking place.

As a result of my study, the larger management community will have greater knowledge of the importance of having resources available, to contribute to the success of an organizational merger by improving employee management. Employees contribute to the success of the organization by ensuring customers are satisfied and return for future service.

The improvement of employee retention will assist with greater organizational stability by increasing employee job satisfaction and decreasing employee turnover. Low turnover rates can help reduce the financial impacts on organizations. Reduction in employee turnover will allow for continuous business and customer satisfaction.

Organizations that maintain low business interruptions allows for continuous customer satisfaction by providing continued service and products during the integration of multiple organizations. Maintaining business as usual, will help organizations to continue to maintain product development and revenue income.

The study provided implications for positive social change through allowing managers to maintain employee satisfaction and engagement, profitability, and continued customer satisfaction. Merger success will maintain a positive impact on business development within the greater community. Business growth will increase the economy within the local communities and throughout the global market.

Conclusions

My phenomenological descriptive study collected and analyzed data from 14 managers resulting in showing positive results and benefits of having resources available to manage employees through a merger. The resources available were from within the organization and also amongst the experience of the management team. Open and honest regular communication between the employee and the manager was one of the major resources that benefited the employees. A manager’s relationship with their employees was crucial in dealing with issues that were raised by the employees during the merger process.

Three research questions guided the data collecting for my study. The central question was: what is the scope of resources available from a manager’s perception, to manage employees through a merger? The answer is that there is a multitude of resources available to the managers to assist when a merger is taking place. Managers have the perception that very little resources were available; however, my study revealed that managers themselves are a great resource, along with other organizational resources. Manager’s personal skills are very important when handling employees through the unknown territory of a merger. Managers should focus on their soft skills when dealing with employees through change because in the end, the employees rely on their supervisor to have their best interest in mind.

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Appendix A: Participant Referral Form

Participant Referral Form

I recommend ________________________________ as a candidate participant for the study titled, *Resources available to Managers to Manage Employees through Mergers.* The participants are known to meet the three criteria for this study:

1. Worked in a supervisory position, for an organization, at the time a merger or acquisition was taking place
2. Managed employees during the merger or acquisition implementation

AND

3. The potential participant does not have a direct working relationship with you to minimize any potential for perceived coercion.

Phone Number: _________________________________

Email Address: _________________________________

The study is being conducted by Jacqueline Bursey, A Doctoral student at Walden University. For the purpose of the study, the participants must have worked in the capacity as a manager or supervisor of employees, while a merger or acquisition took place in North America. The participants have significant knowledge and experience with merger integration while managing employee day to day activities.

I am referring this person as a possible candidate for this study for the following reasons:

1.
2.

Name of person referring the participant: ____________________________________

All information on this form will remain confidential and remain part of the study.

Appendix B: Participant Interview Questionnaire

Manager Responsibilities

1. Please tell me your job responsibilities with the company that eventually merged?
2. How many employees did you manage as part of your day to day responsibilities and how would you describe your relationship with your employees before the merger was announced?
3. What type of special resources or skills have you taken or were provided to help manage employees?

Merger Announcement

4. How were you notified about the merger of the organization you were working with? What communication methods were utilized to inform yourself and then the employees of the merger announcement?
5. How did the employees react to the announcement of the merger? What feeling did you witness among the employees?
6. Once the merger was announced, what type of special resources or skills did you have access to, to manage the employees through a merger?
7. Explain any events or situations that might have occurred resulting in you utilizing the resources or skills to manage the situation?
8. What skills or resources did you find made a different when trying to manage the employee through the merger process?

9. Did you notice any difference in the employees while the merger was taking place? What changes did you notice in the employees? How did the changes affect the employees?

10. What differences did you notice in your manager- employee relationship during the merger implementation?

11. Please describe any changes you witnessed by having resources available to you during the merger, to help manage the employees through the changing times of a merger?

12. Please describe any changes you witnessed from the employees, through the availability of using resources to manage them?

13. Please describe any benefits you witnessed for the organization?

14. What suggestions do you have for managers who manage employees during a merger, in the future?

Appendix C: Participant Initial Email

To: (Participant Name)

Subject: Possible Participant for Research Study

Good day,

I am contacting you because you are invited to take part in a research study about *"Resources Available to managers to manage employees through Mergers"*. I am inviting you to participate in this study to help me achieve knowledge because (a) you were identified as a manager who worked for an organization while it went through the merger/acquisition process, and (b) you managed the day to day activities of employees during the merging/acquisition of the organizations. I obtained your name info via (insert name of manager who suggested the participant who is known to meet the study criteria.) I have attached a consent form as part of a process called "informed consent" to allow you to understand this study before deciding whether to take part.

This study is being conducted by me, Jacqueline Bursey, who is a doctoral student at Walden University. You might already know the researcher as a Safety professional, but this study is separate from that role.

The purpose of this study is to have a better understanding of what resources are available to an organizations management, during a merger/acquisition, to maintain business as usual, and continue to manage employees.

If you agree to be in the study, you will be asked to:

- Take part in a telephone call, FaceTime, WhatsApp or Skype call which will be audio recorded
- Spend no more than 60 minutes in length on the call
- Conduct a 30-45 minute follow up discussion with the researcher to ensure accuracy of feedback.

This study is voluntary. You are free to accept or turn down the invitation. The attached consent form will explain the details of the study.

You may contact me via email at XXXXXXX or 1-XXX-XXX-XXXX if you have any further questions. After you have read the attached form and you feel you understand the study well enough to make a decision about it, please indicate your consent by replying to this email with the words, "I consent."

If you chose to participant, I will then contact you through email or phone.

Thanks, Jackie Bursey