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Financial Service Leaders' Incorporation of Knowledge Management Systems in Overall Organizational Strategy

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This is to certify that the doctoral study by

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has been found to be complete and satisfactory in all respects,
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Abstract

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MS, University of Connecticut, 2005

BS, University of Connecticut, 2003

Doctoral Study Submitted in Partial Fulfillment

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Doctor of Business Administration

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Abstract

Financial service industry leaders successfully incorporating a knowledge management system (KMS) into the overall organizational strategy experience several benefits over firms that do not implement an effective KMS. This multiple case study was an exploration of the strategies financial service industry leaders use to incorporate a KMS in organizational strategy. The case population consisted of 5 leaders from 4 financial services organizations with successful experience implementing a KMS into their overall organizational strategy. The conceptual framework for this study was knowledge conversion theory. The data collection process included semistructured interviews, interview notes, and review of company documents. Data were compiled and organized, disassembled into fragments, reassembled into a sequence of groups, and interpreted for meaning. Methodological triangulation and member checking validated the trustworthiness of those interpretations. Three themes emerged from the 5 interviews: a continuous improvement environment facilitated KMS incorporation, supportive leadership facilitated KMS incorporation, and a learning organization environment improved KMS incorporation. Financial services leaders could use these themes to increase knowledge-sharing capabilities and the potential for innovation and creative capabilities of their organizations to ensure long-term organizational sustainability. The implications for positive social change include the potential for increased revenue that leaders could use to make charitable contributions to further the development of local communities. In addition, leaders' use of lean processing could reduce environmental waste, which would benefit the local community because its residents could enjoy a cleaner environment.

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Dedication

I would like to dedicate this research study to my family. To my children, Kendra and Braden, you are the reasons I began this journey; I wanted to show you how much you can accomplish when you push yourself. When I started, I did not know just how difficult completing this study would be, but, even when it took up so much of my time over the last few years, you were always understanding. To my husband, Greg, thank you for all of your support. When I completely lost my focus and desire, you were what put me back on track. When life became overwhelming, you showed me that anything is possible. I know this project ate up so much of my time and sanity. However, you were always there to pick up the slack and make it all seem manageable (and even enjoyable) again. To my stepchildren, Halyn and Camden, thank you for helping me rediscover my love of learning. You made this project feel less like a chore and more like an adventure. To my parents, Peter and Jody, you are the ones who pushed me to strive for greatness. You taught me the value of education and to never place limits on what I could learn or accomplish. Thank you, everyone, for the sacrifices you made so that I could achieve this dream. I love you all, and I could never have done this without you!

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I would like to acknowledge and thank my chair, Dr. Jorge Gaytan, for the invaluable guidance he provided during this process. I would also like to thank Dr. Erica Gamble and Dr. Matthew Knight for their wonderful contributions to my study. I would also like to thank the wonderful managers I have had who have been so supportive of this endeavor. I could not have balanced work, life, and school without your patience and understanding. In addition, you are the ones who first showed me the significance of effective knowledge management.

Table of Contents

Section 1: Foundation of the Study

Business leaders use organizational knowledge to support decision-making and business processes (Nath, 2015). Organizational knowledge includes data, personal experiences, and development. The ability to channel this knowledge throughout an organization improves a company's efficiency and decision-making processes (Scortu & Neamtu, 2015).

Background of the Problem

Business leaders use knowledge management to provide a uniform way to gather and distribute information. The goal is to have employees across an entire organization or supply chain use consistent tools to reduce wait time and errors. According to Nath (2015), organizational leaders should identify their own unique needs before executing a knowledge management solution. Business leaders could achieve this goal through the evaluation of customer requirements, technical requirements, purpose, document management, and sharing techniques. In addition to technical requirements, business leaders should consider cultural factors.

A factor in the successful utilization of a knowledge management system (KMS) is a supportive environment, which motivates employees to share and access the system (Nath, 2015). Leaders achieve success of the KMS process by encouraging employees to learn, become creative, and communicate effectively (Nath, 2015). Business leaders using knowledge resources appropriately improve problem solving, decision making, quality, and creativity, providing their firms with a competitive advantage (Aalbers, Dolfsma, & Koppius, 2014). When leaders encourage learning and creativity among

their employees, leaders facilitate a knowledge model of creation, storage, sharing, and utilization.

Business leaders should be aware that the processes for knowledge management vary across organizations and industry. Mojibi, Khojasteh, and Khojasteh-Ghamari (2015) classified three infrastructure factors that business leaders should align for KMS implementation. These factors include the information technology system, knowledge processes, and organizational culture.

Problem Statement

Financial service industry leaders successfully incorporating a KMS into the overall organizational strategy experience several benefits, including increased sales, profits, and innovation performance over firms that do not implement an effective KMS (Bagnoli & Vedovato, 2014). However, only 50% of the financial services organizations that invest in KMS implementation projects experienced measurable benefits from this investment (Pradana, Kurniawati, & Ambarsari, 2015). The general business problem was that some financial services organizations are not taking advantage of the benefits associated with the effective integration of a KMS into their overall organizational strategy. The specific business problem was that some financial service industry leaders lack strategies to incorporate a KMS into their organizational strategy effectively.

Purpose Statement

The purpose of this qualitative study was to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. The population consisted of financial service industry leaders, located in the northeastern

United States, possessing successful experience using strategies to incorporate a KMS into their organizational strategy. The implications for positive social change include the potential for increased revenue that leaders could use to make charitable contributions to further the development of local communities. In addition, leaders' use of lean processing could reduce environmental waste, which would benefit the local community because its residents could enjoy a cleaner environment.

Nature of the Study

Yin (2018) described three research methodologies: qualitative, quantitative, and mixed-methods. A qualitative study is exploratory in nature because researchers use the qualitative methodology to describe the practices and experiences of the research subjects (Guercini, 2014). In a mixed-methods study, the researcher uses a combination of qualitative and quantitative techniques for data collection and analysis (Yin, 2018). The mixed-methods research methodology allows the researcher the freedom to employ both inductive and deductive reasoning (Yin, 2018). Researchers using the quantitative research methodology rely on accurate, consistent data collection to identify relationships between two or more variables (Bettis, Gambardella, Helfat, & Mitchell, 2014). Because there was no hypothesis to test and no numerical data to evaluate for this KMS study, I did not use the quantitative or the mixed-methods research methodologies in this study. I opted to use qualitative methodology for my investigation of financial service leaders' use of a KMS.

According to Guercini (2014), researchers use the qualitative research method to take advantage of conducting the research in a natural setting, which provides a more

accurate window into the real-life implications of a social phenomenon. Researchers use the qualitative research methodology to explore *what*, *why,* and *how* questions during the research (Yin, 2018). For this reason, I selected the qualitative research method to explore the strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. In addition, qualitative researchers make observations, conduct interviews, and conduct document analyses (Yin, 2018). I conducted semistructured interviews, made observations of participants' nonverbal cues during the interviews, and analyzed company documents in this study.

The research designs under the qualitative research method include narrative, which researchers use to describe an individual or group's life stories (Weber, 2014), and phenomenological, which researchers use to focus on a small group's experience regarding a specific event (Budd & Velasquez, 2014). Additional qualitative designs include ethnographic, which focuses on the culture within a community (Natalia & Luciano, 2014), and case study, through which the researcher explores the *how* and *why* of a particular phenomenon (Yin, 2018). The narrative approach focuses on participants' experiences in an open, interpretative way, and it is not structured (Weber, 2014). I did not focus on participants' experiences in an open, interpretative way. Therefore, I did not use the narrative research design. Researchers using a phenomenological design focus on the exploration of the study participants' shared experiences (Budd & Velasquez, 2014) and, consequently, it is not the best-suited research approach for my study. According to Natalia and Luciano (2014), the ethnographic research design approach requires the researchers to do an in-depth shadowing of the culture to develop an understanding of

that culture. This was not the focus on my study, which is why I did not use the ethnographic research design approach.

Researchers use the case study design to bridge business research with business practice (Grandon, 2014). Researchers use the case study design to develop original understandings of relationships and strategies (Pedrosa, Naslund, & Jasmund, 2012). I used the case study research design. I explored the *what*, *how,* and *why* of a particular phenomenon which, in this case study, is the exploration of strategies financial service industry leaders use to incorporate a KMS into their organizational strategy.

Research Question

The overarching research question for this study was, as follows: What strategies do financial service industry leaders use to incorporate a KMS into their organizational strategy effectively?

Interview Questions

1. What knowledge management system did you employ in your organization?
2. If there are multiple knowledge management systems, how do they work together?
3. Which employees in your organization were required to participate in the knowledge management system program?
4. What strategies did you use to encourage employees to participate in the knowledge management system program?
5. What roadblocks to participation in the knowledge management system did you encounter in your organization?

6. How involved is leadership in the oversight of the knowledge management system?
7. What cultural elements of your organization contributed to the level of success of your knowledge management system?
8. What measures were in place to test the success of the knowledge management system?
9. How structured are the procedures for participating in the knowledge management system?
10. What else would like to share regarding strategies financial industry leaders use to incorporate a KMS into the organizational strategy effectively?

Conceptual Framework

The conceptual framework for this study was knowledge conversion theory. Nonaka and Takeuchi (1995) and (Sarabia, 2007) introduced the knowledge conversion theory and Nonaka and Toyama (2003) and Nonaka and von Krogh (2009) later advanced knowledge conversion theory, which is the foundation for creating and utilizing organizational knowledge. Nonaka and Takeuchi generated a 5-step model for organizational knowledge:

1. Sharing of individual knowledge,
2. Translating individual experiences into concepts,
3. Testing validity of the concepts,
4. Developing standards, and
5. Distributing the knowledge throughout the organization.

Industry leaders should promote a knowledge sharing strategy that meets the needs of the internal business partners. Industry leaders use the knowledge conversion theory to promote a consistent and standard model for generating and distributing organizational knowledge (Sarabia, 2007). Nonaka and von Krogh (2009) claimed that industry leaders using knowledge conversion theory contribute to organizational creativity, learning, innovation, and change. Although there is no generally accepted conceptual framework for how service industry leaders incorporate a KMS into their organizational strategy effectively, knowledge conversion theory seemed to be an effective foundation for this study. The focus of this study was on how financial service industry leaders incorporate a KMS into their organizational strategy effectively to take advantage of knowledge creation and sharing.

Definition of Terms

Ba: Ba is a Japanese philosophy relating to an environment that creates, shares, and applies knowledge (Chen & Huang, 2013).

Knowledge management system: Knowledge management system is a system that channels organizational data, personal experiences, and development (Scortu & Neamtu, 2015).

Organizational culture: Organizational culture is a classifying component of a firm, representing values, goals, expectations, and behaviors. Organizational culture is a distinctive characteristic of an organization that can unify and inspire employees (Ionescu, 2014).

Relearning: Relearning is the process of continuing to learn and explore (Zhao, Lu, & Wang, 2013).

Unlearning: Unlearning is the process of discarding useless and outdated information and processes (Zhao et al., 2013).

Assumptions, Limitations, and Delimitations

This section includes a discussion of the assumptions, limitations, and delimitations of this study. Assumptions are something the researcher accepts as true without verified proof (Scherdin & Zander, 2014). Limitations are the constraints or flaws in the study (Prowse & Camfield, 2013). Delimitations are the choices and boundaries set by the researcher to define the parameters of the research (Rusly, Sun, & Corner, 2014).

Assumptions

In accordance with the guidelines set forth by Ellis and Levy (2009), I made five assumptions that are unsubstantiated but generally accepted as true. The first assumption was that the interviewees would answer the questions honestly and to the best of their ability. The second assumption was that the research participants would embody the designated population. The third assumption was that the data collected from the research questions would encompass the scope of the research. The fourth assumption was that the literature review would holistically captures the history and range of the subject. The fifth assumption was that the definition of organizational knowledge was a standardized concept across each represented organization.

Limitations

Prowse and Camfield (2014) defined limitations as constraints in a study. I identified two limitations. The first limitation of this study was the research design and methodology. The qualitative research method relies solely on the researcher's interpretive reasoning. I could have made a mistake related to my interpretations of what I saw and heard. The second limitation is that different participants might have had different levels of understanding of the concepts discussed. I assumed that the definition of knowledge is standard across each organization, but participants may have possessed varying definitions of KMS, which could have weakened the study. The focus of this study was not on the types of knowledge stored but rather on the success of the KMS.

Delimitations

Rusly et al. (2014) contended that the researcher should define delimitations to define the parameters of the study. The scope of this study was financial services organizations in the northeast United States. The results of the research could vary if the scope expanded to include other categories of organizations or different locations.

Significance of the Study

The purpose of this qualitative study was to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. This study might contribute to improving organizational performance in the implementation of a KMS. In the sections below, I present possible contributions of my study to business practice and social change.

Contribution to Business Practice

The results of this study may provide financial service industry leaders with effective strategies for incorporating a KMS into their organizational culture. According to Singh (2013), a KMS supports sustainable competitive advantage. The advantages of a successful KMS include corporate innovation, agility, and employee satisfaction (Singh, 2013). Innovation and agility strengthen organizational performance, and employee satisfaction can help to attract and retain talented employees (Singh, 2013). Financial leaders will experience financial benefits from the increased revenue due to the competitive advantages and decreased waste due to strong organizational performance (Singh, 2013).

Organizational culture is particularly influential on the success of a KMS implementation (Chang & Lin, 2015). Leaders establish a supportive tone of a firm by encouraging learning and creativity. When business leaders value knowledge, they create, store, share, and use this knowledge within their organizations. Once business leaders implement the KMS, they need to develop strategies to support the use of the system, allowing the organization to reap the benefits of the KMS (Chang & Lin, 2015). These leaders should promote learning, creative thinking, and communication. If used appropriately with an effective strategy, KMS can provide organizations with a competitive advantage by improving employees' problem-solving, decision-making, and creativity (Chang & Lin, 2015).

Implications for Social Change

In addition to increasing business organizations' competitive advantage, business leaders use a KMS to minimize organizational risks. The goal is to monitor potential threats to the organization and control any factors that could negatively affect operations or the community (Singh, 2013). Guo-Ciang (2013) maintained that the management and production of knowledge is the key to risk management. Transmitting knowledge and values throughout the supply chain increases awareness regarding threats and reduces costly errors, which could increase revenue for the organization. Financial service industry leaders might use this increased revenue to make charitable contributions to the community.

Machado, Scavarda, and Vaccaro (2014) identified a correlation between a KMS and lean processing. Lean processing is the generation of an efficient system committed to continuous improvement and elimination of waste. Organizational leaders revisit and analyze current processes and procedures to determine the essential steps to eliminate waste, which could also increase revenue for the organization. Financial service industry leaders might use this increased revenue to invest in the social development of the local community.

In some cases, a team overhauls an entire process and implements a new procedure or a technological solution. Leaders using this new process are able to streamline production, maintain quality, improve customer service, and enhance knowledge management. Providing improved customer service to community members is an implication for positive social change. In addition, leaders use lean processing to

reduce environmental waste (Machado et al., 2014), which benefits the local community because its residents could enjoy a cleaner environment.

A Review of the Professional and Academic Literature

In this section, I review the literature on KMS strategies published in various peer-reviewed journals and seminal scholarly books. Google Scholar, which I accessed via Walden University Library's website, served as the primary means of retrieving journal articles. Within the Walden University Library, I had access to various databases including Business Source Complete, ABI/INFORM Complete, Emerald Management, Sage Premier, Academic Search Complete, and ProQuest Central. I used these resources to review theories and literature related to KMS and the strategies for implementing these systems into organizational strategy and culture.

My strategy for searching through existing literature entailed the use of keywords and phrases in the various databases. I also applied filters to my database searches. I searched for peer-reviewed articles giving preference to those published on or after January 1, 2014. This strategy ensured that the literature was relevant and trustworthy. Second, I applied keyword filters. These included *KMS*, *organizational culture*, *organizational success*, *innovation*, *lean processing*, and *organizational strategy*. I applied filters to database searches to narrow down the search results. These filters included specific keywords, a specified period, and specific databases. There are 161 references cited in the overall study; 148 of the references are scholarly peer-reviewed articles representing 91.9% of the total. In addition, I cited two books representing 0.1% and three government websites representing 0.2% of the total. The total number of

references published within the past 5 years is 148, which is 91.9% of the total references. The literature review in this section includes 65 references. The publication date for 55 (85%) of these references is between 2014-2018. In addition, all 65 (100%) references are peer-reviewed journal articles and not websites and nonscholarly articles.

Literature Review Organization

The literature review section has several subsections. The introduction includes the strategy for searching the literature and the background regarding the publication date and percentage of peer-reviewed articles. In the next section, I describe the purpose of the study and apply the literature to the research question and to the conceptual framework, which is knowledge conversion theory. I provide contrasting viewpoints and identify relationships between prior research and this study. The themes I address in the literature review include components within an effective KMS, strategies for implementation of a KMS, and the impact of a KMS on organizational performance.

The subsection on the first theme, the components within an effective KMS, includes an examination of knowledge conversion theory. I review supporting and opposing theories from academic literature regarding the topic of KMS and organizational culture, including disruption of innovation (DOI) theory, which focuses on identifying and developing growth through innovation (Raynor, 2011), and the resource-based view (RBV) theory, which is the theory that an organization's competitive advantage stems from the application of the firm's resources (Akio, 2005). I also discuss Senge's (1991) theory of the learning organization, which provides organizations with a

framework that allows leaders to facilitate learning and continuous improvement and to create knowledge as it relates to organizational culture.

I begin the subsection on the second theme with a discussion of organizational culture and the influence of leadership and strategy on a KMS. The third and final theme is the impact of a KMS on organizational performance. I begin with a discussion of indicators for organizational performance, including flexibility, innovation, and profitability.

Application to the Applied Business Problem

The purpose of this qualitative study was to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. The findings from this study could provide additional understanding of KMS strategies from the perspective of leaders within the financial services industry. Understanding these strategies might equip leaders with the skills to improve the implementation and incorporation of their KMS into their overall strategy. The findings from the study might improve business practice by highlighting industry appropriate strategies, leading to increased quality and organizational competitiveness. The potential for social change rests in the development of strategies to improve organizational process and reduce organizational and environmental waste.

Knowledge Conversion Theory

The conceptual framework for this study was Nonaka and Takeuchi's (1995) knowledge conversion theory. In this section, I present an analysis of research studies in which authors used this theory as their conceptual framework. I examine work that

focused on creating and using organizational knowledge. Knowledge conversion theory is significant to my research because it provides a framework for applying organizational learning into the overall strategy (Nonaka & Takeuchi, 1995).

Nonaka and Toyama (2003) conceptualized organizations as organic entities that are constantly in motion. This concept contradicts the more traditional theory of viewing organizations as information-processing machines. In this context, knowledge becomes an ever-growing and changing process as opposed to a structured action.

In knowledge conversion theory, an organization and individuals interact with one another. This dynamic relationship creates and shares knowledge. In this process, the organization is not a static, information-processing entity. Instead, the organization is a crucial component in the cyclic process of creation and learning. The organization becomes an active, rather than a passive, contributor to knowledge creation and management (Nonaka & Toyama, 2003).

Fisk (2015) incorporated knowledge conversion theory into his research regarding building trust amongst cross-functional team members. The focus of Fisk's study was tacit knowledge, based primarily on personal experiences and contexts. When team members do not build adequate trust, they fail to adequately share or transfer this tacit knowledge (Fisk, 2015). Fisk described knowledge creation theory as the underlying concept that allowed individuals to build enough trust to move knowledge through an organization.

Fisk (2015) stated that organizational leaders should combine knowledge conversion theory and *Theory U* in order to develop organizational trust. Theory U is the

concept that the quality of the results of any system directly correlates to the awareness of the system's participants (Fisk, 2015). Individuals' ability to create and perform stems from what they focus on and how they learn. Fisk affirmed that changing the mindset of the organization's employees could alter the organization's output and quality.

Booker (2015) cited the pitfalls of the growing job turnover rate of Millennials. Although employees could once stay in a job for decades, the current average is around 3 years (Booker, 2015). With such a high flow of new employees, it is more important than ever to develop a corporate culture that encourages knowledge management and communication. Knowledge conversion theory engages the individuals in the process of knowledge transfer and management. In this way, knowledge is not a single point dependency and it is not lost if an employee transfers (Booker, 2015).

In addition to researching the differences between the ways Millennials and Baby Boomers transferred knowledge, Booker (2015) compared the way knowledge transfers between different types of organizations. Specifically, Booker compared and contrasted the methods used by corporate, educational, and religious organizations. Booker drew the following conclusions: Knowledge transfer depends on leadership guidelines, and Baby Boomers and Millennials complement one another and can learn from the opposing styles.

Wagner, Vollmar, and Wagner (2014) highlighted the importance of information technology when creating knowledge within organizations. The experiences and intelligence of the employees may be lost if there is not a sufficient tool for harnessing this knowledge. Wagner et al. used the socialization, externalization, combination, and

internalization (SECI) model within knowledge conversion that stems from knowledge conversion theory. Wagner et al. postulated that a KMS is a vital component to the SECI model and that technology expands organizational KMS from a local to a global level. This process allows for broader and faster knowledge development and fosters innovation (Wagner et al., 2014).

An item lacking from knowledge conversion theory is the need for a tool for capturing and distributing knowledge. With the creation of the Internet, the role of a global system became increasingly important for organizational success (Wagner et al., 2014). Social media has since furthered that need. The social media tools allow instant, widespread, and diverse means to communicate and gather information. Knowledge conversion theory can enhance the usage of company social media outlets.

Chen and Huang (2013) cited *knowledge* as the framework to study topics, such as organizational behavior, leadership, strategy, and management. In addition to acting as a building block for the SECI model, Chen and Huang believed knowledge conversion theory is the basis for managerial studies regarding differences in leadership strategies. Knowledge conversion theory is a dynamic process involving knowledge creation and distribution that relies on human participation. Chen and Huang drew upon the concept of *ba*, which is a Japanese philosophy that relates to an environment that creates, shares, and applies knowledge. The authors expanded the idea of knowledge creation beyond the organization and employees to encompass entire networks and markets. They concluded that for a KMS to be successful, it should not focus merely on a singular process, but rather a strategy for top leadership to foster a knowledge-creating organization.

Randall, Nowicki, Deshpande, & Lusch (2014) studied the way organizations convert knowledge into value. The theories of service-dominant logic (S-D logic), supply chain management (SCM), and human resource management (HRM) contribute to the conversion of knowledge. Specifically, these theories influence human decision-making processes to gain an understanding of the way different cultures influence managerial decisions that can help manage supply chains. S-D logic provides the distinction between knowledge and applied knowledge. Knowledge alone cannot add value without communication and distribution. In the financial industry, the product is rooted in knowledge. Knowledge and skillset both contribute to the service level of the organization and can increase competitive success (Randall et al., 2014).

SCM is a common framework in the manufacturing industry. This concept relies on continuous improvement and standardized procedures and knowledge conversion. Collaboration and knowledge sharing are vital components to a successful supply chain network (Randall et al., 2014). HRM highlights the way decision-making processes influence the conversion of knowledge into value. Managers that take the time to learn the way their employees make decisions will have more insight into how to tap into their knowledge (Randall et al., 2014).

Reid (2014) drew upon Nonaka's (1991) concept of knowledge conversion theory to accentuate the fact that organizational knowledge and growth develops by distributing individual knowledge in a meaningful way. Despite this fact, organizations do not often invest in knowledge creation and conversion. Reid found this was due to a combination of a lack of trust in the employees to share their accumulated knowledge and the

reluctance of the leaders to risk the financial investment required for a KMS. The promotion by leaders of knowledge sharing influences knowledge creation and mobilization (Reid, 2014).

Singh and Gupta (2013) found a gap in the measurement of a KMS. In order to construct a holistic measure, Singh and Gupta integrated multiple concepts related to a KMS. These concepts focused on knowledge creation, knowledge sharing, and knowledge retention. Singh and Gupta measured knowledge creation, conceptualized by knowledge conversion theory, in terms of learning opportunities, motivation, organizational culture, and management style. The concepts Singh and Gupta used to measure knowledge sharing where availability of information, perceptions of value of the source of knowledge, willingness of participants to share knowledge, willingness of participants to acquire knowledge, and the capacity of the recipient to absorb the knowledge. Singh and Gupta measured knowledge retention based on a KMS and organizational procedures.

Singh and Gupta (2013) found that trust, cost, time, support, and interest were all important drivers for knowledge creation. The success of knowledge sharing also depends on these factors in addition to formal information systems and the technical skills for using these systems. Knowledge retention depends on the quality of documentation and the organization of the system.

Garstenauer, Blackburn, and Olson (2014) utilized knowledge conversion theory to support the assumption that a KMS can improve the effectiveness of quality management systems. Traditional quality management tools can be cumbersome and

limited. Quality management systems do not foster knowledge creation or continuous improvement opportunities. As a result, they are susceptible to communication deficiencies, operational inefficiencies, and competitive pressures (Garstenauer et al., 2014). Quality management systems primarily transmit data and information. Organizations that expand these systems to transmit knowledge, as defined under knowledge conversion theory, can have faster response times to communicate issues and improvements. Garstenauer et al. found that organizations that implemented a KMS experienced enhanced quality management, increased customer satisfaction, and improved firm performance.

Organizational knowledge across multiple teams and departments can be challenging to manage. For instance, managing knowledge across a supply chain network and spanning multiple companies and locations can prove to be even more difficult. Sudhindra, Ganesh, and Arshinder (2013) developed a classification model to establish a uniform system across an entire supply chain. Due to the added complexity of managing multiple organizations across various boundaries, Sudhindra et al. proposed simplifying the knowledge categories to make a generic model that would be easier to adhere to the entire supply chain. Knowledge conversion theory defined the types of knowledge managers need to control, including tacit and explicit. The knowledge model should concentrate on successfully transferring the personal, tacit knowledge into codified, tangible explicit knowledge. Sudhindra et al. found the most important components of a successful classification model to be evidence, time, and measurability.

Villasalero (2014) focused on the impact of a KMS on multibusiness firms and organizational performance. Villasalero studied organizations with no KMS, those that managed only information and data, and additional firms that supported knowledge creation and communication. Villasalero studied the type of knowledge in the KMS and the direction the knowledge flowed across a multi-business firm. The results indicated leaders that promoted innovation, unique knowledge creation, and learning managed the most successful and competitive firms. These leaders were the most likely to support the flow of knowledge in all directions within an organization, as opposed to only moving knowledge from the top down. When managers encouraged employees at all levels and locations to contribute to the KMS, the overall performance of the organization improved. Villasalero demonstrated the positive impact that knowledge creation, as defined under knowledge conversion theory, can have on a firm's competitive advantage.

Villasalero (2013) studied the effect of divisional level knowledge flows on organizational performance. The results indicated that knowledge transfer positively influences firm performance and competitiveness. This knowledge encompasses personal experiences and organizational procedures. Villasalero used knowledge conversion theory as the basis for defining how organizations create and share knowledge. Knowledge sharing improved organizational learning, cross-functional communication, and firm resources. Knowledge creation and storage can also improve firm performance. Organizational learning and innovation often improve. However, Villasalero found that organizations that did not code the knowledge in an adequate KMS

did not experience improved performance over competitors. Therefore, it is essential to find the appropriate resource to codify knowledge and procedures.

In addition to creating and sharing knowledge, organizations need a system for managing it in an appropriate and ethical way. Akhavan, Ramezan, Moghaddam, and Mehralian (2014) investigated the relationship between ethics and knowledge management. Successfully storing and maintaining organizational knowledge can lead to decreased errors and rework. In an age where information is delivered at a rapid rate, it is essential that businesses maintain the trust and confidence of their customers and shareholders. Business ethics focuses on the moral quality of decision-making and organizational operations. In a global economy, businesses need an effective method for developing and communicating a consistent ethics model. Akhavan et al. determined that organizations using knowledge conversion theory as a basis for the KMS had well-defined ethics models.

Zhao et al. (2013) developed a model to explore the process of dynamic learning in KMS. Knowledge management contributes to organizational flexibility and the ability of firms to adapt in a fast-paced economy. However, in order for a KMS to be effective, it is important for employees to practice *unlearning* and *relearning*. *Unlearning* is the process of discarding useless and outdated information and processes. Stripping the KMS of stale and antiquated data reduces waste and duplicate information and increases retrieval time (Zhao et al., 2013). *Relearning* is the process of continuing to learn and explore. Procedures can always be improved through new functionality or experience.

The KMS should be a dynamic tool where individuals add, update, and remove processes as appropriate.

An, Deng, Chao, and Bai (2014) sought to support collaboration and innovation through a KMS. Communication, organization, and learning are the three ways knowledge management contributes to organizational sustainability and competitiveness. A KMS provides a holistic solution for building trust and communication since members at all levels may contribute and garner information. An et al. found that this participation led to increased interest and desire to learn, which led to increased innovation.

Organizations that function in an international marketplace may run into the issue of sharing processes and functionality across multiple and diverse locations. Ideally, each entity would operate consistently with one another. Paswan, D'Souza, and Rajamma (2014) developed a framework for a franchise network that would expedite knowledge exchange. Through this framework, each franchise would operate under the same principles and procedures as the parent company. In addition, the parent company would gather knowledge from each franchise in order to gain a competitive advantage. Paswan et al. stated that knowledge is the operant resource to competitive advantage and should be collected from each location and dispersed through the entire chain.

There is a general acceptance regarding the importance of tacit knowledge and organizational advantage. Firm leaders agree that managing this knowledge can positively affect firm performance and economic profit. However, according to Crane and Bontis (2014), tacit knowledge can be difficult to understand and articulate. This ambiguity makes it a difficult asset to leverage. Crane and Bontis expanded knowledge

conversion theory to understand how tacit and implicit knowledge work together. Several studies on a KMS focused on ways to harness the tangible or tacit knowledge. A strong foundation for employee acceptance of the KMS and leader-developed learning support effective utilization of the KMS. If the users do not participate in the system, they will never be able to maximize the potential for competitive edge.

Other studies exist related to the importance of implicit knowledge and learning. Zhang, Zhao, Lyles, and Guo (2015) studied the effects of learning capacity on innovation. Zhang et al. (2015) conceptualized the capacity for learning through the processes of knowledge acquisition, knowledge assimilation, and knowledge application. The results indicated that knowledge acquisition enhanced knowledge assimilation and application. These findings suggest that investing in and supporting organizational learning can increase the success of the overall KMS. Firms that reward employees for learning have an easier time collecting, codifying, and distributing knowledge.

Ranucci and Souder (2015) sought to find a simpler way to codify tacit knowledge. Ranucci and Souder found that firm-specific routines and consistency were key factors in the ability of an organization to transfer knowledge. Trustworthiness leadership is the foundation for knowledge transfer; however, employees will not share information if they are apprehensive about how knowledge will be used. The next step would be for the firm to centralize processes and integrate the KMS throughout the organization. Firms that utilize standardized procedures are better able to maximize the potential of their KMSs than organizations that operate in silos.

Lech (2014) explored the effect of a KMS on enterprise system implementation projects. Enterprise systems incorporate resource planning, customer relationship management, business intelligence, workflow, and any additional applications, which require knowledge from different areas of the organization. Lech determined that knowledge transfer and creation were key components in the success of the overall enterprise system. In the same way that technology is an important component of a successful KMS implementation, knowledge management is an important component in an IT project implementation. Lech ascertained the importance of the project team encompassing the following knowledge types: business, technological, company-specific, project, and communication.

Tsai (2014) developed a model for organizational knowledge sharing. The purpose of this model is to integrate the KMS into the business processes and to measure the benefits of the KMS. Tsai aligned the model with existing business practices and values. Technology allowed the knowledge collection and sharing to become an automated process. Tsai modified the technology available for different users across the organization to fit the individual needs while remaining consistent and uniform. Tsai built feedback collection into the model in order to test the effectiveness and allow for continuous improvement.

O'Brian (2015) conducted case studies to explore organizational knowledge management. O'Brian found that firms retain knowledge within the silos of functional teams. These teams tend to hoard this knowledge. In addition, time and resource limitations led to a lack of formal procedures related to the KMS. These KMS limitations

led to knowledge retention problems and a lack of clarity surrounding roles and responsibilities. O'Brian's research is important because, although theoretically a KMS improves overall organizational innovation and competitiveness, barriers exist that must be dealt with. O'Brian identified the common barriers, which can help improve a KMS transition.

Chandra, Iyer, and Raman (2015) sought to break down these barriers by studying knowledge flow patterns amongst employees. The inability to effectively capture and reuse knowledge and to understand the knowledge flow can lead to a lack of formal communication and collaboration within a firm. Each team works differently and, therefore, customizing the KMS to the needs of each unit can lead to more successful knowledge utilization. Chandra et al. used the principles of knowledge conversion theory to customize the KMS. Specifically, Chandra et al. focused on knowledge socialization, knowledge externalization, combination, and internalization.

Disruption Theory

Raynor (2011) described the disruptive innovation theory, which is the combination of offering services that are difficult to replicate and appealing to a less attractive market. Through this use of innovation, emerging and start-up businesses can promote growth. Effective knowledge management could support organizational innovation. Raynor studied the effect innovation has on positively influencing a company's overall success in emerging markets.

Weeks (2015) addressed concerns regarding disruption theory. These concerns included ambiguous definitions in the theory and a lack of a measure for analysis in the

research. Weeks explored these concerns and pled the case that disruption theory is still a relevant component for encouraging innovation. Weeks advanced the theory by tightening the definition of disruption theory to address specific instances where innovation costs less and appeals to a subset of an existing market or an entirely new market. In this setting, disruption innovation theory can provide a useful framework for organizational innovation.

King and Baatartogtokh (2015) maintained that disruption innovation theory is a useful and valuable tool for managers. Managers that employ this theory are well positioned to respond to a fast-paced, changing environment. Innovation is an important component for maintaining a competitive edge in an international market. However, King and Baatartogtokh cautioned leaders to ensure that the drive for innovation did not surpass the needs of the customers. It is essential to maintain a balance so that the niche a company creates in the market is one that has a strong customer base.

The modern, international, marketplace is rife with competition, mergers, and acquisitions (Zakrzewska-Bielawska, 2016). The challenges of these transactions can include inconsistent technologies, lack of communication, and conflicting cultures. The presence of a well-defined, user-friendly KMS can alleviate some of these challenges. This presence can set the foundation for common vocabulary, which can improve the initial communication. Barnes, Raynor, & Bacchus (2012) found that without a proper KMS, organizations could experience a significant disruption of innovation during the transitional periods of mergers or acquisitions.

The current business environment is volatile and fast paced. Therefore, supply chains need to be resilient and adaptable. Scholten, Scott, and Fynes (2014) developed managerial strategies for navigating supply chains in such an environment. Scholten et al. determined that the main components for achieving success are engineering, collaboration, agility, and risk awareness. Organizational innovation can influence the agility and engineering aspects of this strategy. A KMS can increase collaboration and awareness.

Two challenges to supply chains are risk and competitive pressure. Cantor, Blackhurst, Pan, and Crum (2014) examined the risk management-activities firms can implement to combat these challenges. Cantor et al. found that a KMS is a key component for minimizing risk. Leaders influence the level of knowledge management activities by holding employees accountable and setting expectations. A learning-oriented culture promotes communication and reduces risks for a supply chain. Management that utilizes disruption theory has the innovation to carve out a niche in a competitive market. Together, knowledge management and disruption theory, allow supply chains to respond to the major challenges (Cantor et al., 2014).

In some instances, an innovative environment can be the catalyst for an organization's disruption. Akiike and Iwao (2015) addressed the dilemma that occurs when an innovation is powerful enough to change the face of the market. Akiike and Iwao found that in order to be successful, organizations should not just focus on creating new products. Instead, they need to have a dynamic strategy to anticipate threats, identify opportunities, and constantly reevaluate the company's assets. Focusing on only

one or two of these points can leave an organization susceptible to disruptions. However, focusing on all of them can help firms grow and compete.

Moon and Lee (2015) researched one strategy for reevaluating an organization's assets. Strategic learning is the process of reinventing strategy. Managers that employ this strategy possess the ability to refresh the organizational knowledge continuously and to respond to changes at the organizational and industry levels. This ability can prepare an organization for unknown future changes and disruptions. The organizational learning process is consistent with the firm's routines, procedures, and technologies. These can all be connected through a KMS. In addition, the KMS can be a basis for an organizational leader to connect the organization's culture with its learning strategy for a consistent and flexible community.

Resource-Based Theory

Akio (2005) defined RBV as the theory that an organization's manager of internal resources can influence organizational performance. Akio focused primarily on the unique resources. If a competitor can easily replicate a resource, this resource would not represent a tool to gain competitive advantage. Successful management of the internal assets against the external demands and threats could lead to organizational sustainability (Akio, 2005).

Parker, Parsons, and Isharyanto (2015) explored the impact of RBV theory on project management. One of the main roles of the project manager is to oversee and balance the project's scope, schedule, and resources. In addition, project managers need to prioritize the distribution of these resources across various organizational projects.

RBV theory provides a framework for developing resource-based core competencies and a model for applying these resources. This application may lead to competitive advantage and project efficiency. One of the core competencies project managers administer is the internal organizational knowledge. Therefore, a KMS is a tool utilized in RBV (Parker et al., 2015).

Globalization is a factor in the importance of a knowledge-based economy. Strategic location is no longer the asset it once was; the Internet increased the competition to a worldwide scale (Gioacasi, 2015). This shift has increased the value of RBV and knowledge management. The internal resources of an organization are now some of the most essential components to gain competitive advantage. Leaders that employ RBV explore the relationship between external opportunities and internal resources. Leaders use the information captured in a KMS and employ it in a strategic and beneficial manner.

Drouin and Jugdev (2014) explored the impact of RBV on project management and competitive advantage. An organization can gain sustainable competitive advantage through proper management of its strategic assets. These are the specific assets based on a firm's unique skills and knowledge. In addition to managing these assets, it is important for an organization to categorize and organize them. This systemization can contribute to effective project management, allowing managers to balance the resources with the competing priorities within the organization.

Victer (2014) utilized the RBV to determine the implication of a KMS on strategy and performance. Victer expanded RBV beyond the theoretical concepts to determine

the applications in market performance. Victer found value and proficiency the most integral components organizations should possess to gain and maintain market competitiveness. Continuous improvement and knowledge management are key components for achieving this value and capability. RBV supports the concept that knowledge is an essential resource for organizational strategy. Victer determined that although the uniqueness of the knowledge was important, it was not as impactful as the ability of the organization to improve the knowledge and processes.

Global marketplace growth has increased exponentially over the last few decades (Bouncken, Schuessler, & Kraus, 2015). Even emerging businesses must expand at a rapid rate to compete effectively. Therefore, organizational leaders must quickly learn about global networks and economies. A KMS can assist organizations with their education regarding foreign markets. A KMS can also increase flexibility and adaptation, which assists firms, as they are growing and changing (Bouncken et al., 2015). Hu, Wen, & Yan (2015) measured knowledge for sharing and transferring. Hu et al. focused on the knowledge components of labor, technology, and utilization. Distinguishing between the various knowledge components allows managers to measure the overall success of the KMS. This approach allowed Hu et al. to focus on the value of the KMS, as opposed to the performance. In this way, organizational leaders can better determine the overall competitive impact of the KMS.

Matherly and Al Nahyan (2015) studied the impact of a KMS on international business models and the interactions between employees across borders. In a global economy, organizations can outsource portions of their business to other countries to

leverage specialized knowledge and skillsets. Teams in this scenario may experience language and communication barriers. A KMS can help overcome these roadblocks. Matherly and Al Nahyan determined the most successful KMSs work in conjunction with engaged senior leaders. Leaders should foster an organizational culture of trust and openness, provide incentives for knowledge sharing, and develop teams with the appropriate skills and qualifications.

Organizational growth can be an important component for competitiveness and strategy. Laihonen, Lonnqvist, and Metsala (2015) studied the relationship between an organization's knowledge management and growth management strategies. An effective KMS provides companies with an inventory of the knowledge resources. In addition to the resource inventory, leadership can use the KMS to house current organizational details, such as trends and capacity. These items can help leaders make an informed decision regarding the capacity for growth. Organization, strategy, and assets can all contribute to an organization's growth potential. A KMS can positively influence all of these factors (Laihonen et al., 2015).

Tan and Ding (2015) analyzed the progression of strategic management theory over an 11-year span. RBV is an important factor in strategic management theory; therefore, strategies should maximize the available resources within an organization. Traditional strategic management can be cumbersome and is often behind current practice due to globalization, technical innovation, and information system innovation. Tan and Ding concluded that an effective KMS was an essential component for maintaining a firm's resources and implementing them into the overall strategy. In

addition, a KMS allows organizations to be more flexible to react to an evolving landscape.

Najmaei, Rhodes, and Lok (2014) researched the knowledge structures within business models to determine how they support overall business strategy and decision-making. Najmaei et al. found that knowledge structure embodies technological resources and market components. Organizations that gain an understanding of these components and have access to a KMS that can organize this information can adapt to market changes. Knowledge regarding internal resources and external threats and opportunities are important tools for developing business strategy.

Employees can be a valuable resource for firms (Olander, Hurmelinna-Laukkanen, & Heilmann, 2015) because they can provide innovation and enthusiasm. Through research, development, and collaboration, employees can propel the organization forward and increase competitive advantage. However, according to Olander et al., human resources can also be a risk or weakness for a firm because employees may leak sensitive information, cause errors, or represent dependencies that can leave when another opportunity arises. KMSs are a way to manage the mobile resource because they allow individuals to standardize procedures to reduce human error and to capture the knowledge that resides within the employees.

Mathur, Jugdev, and Fung (2014) researched the impact of RBV on firm performance. Mathur et al. provided a model to identify the resources that contribute to a firm's performance to determine sources of competitive advantage. Mathur et al. found

knowledge and unique resources key sources of project management success and positive firm performance.

Learning Organization

Another complimentary theory to knowledge conversion theory is Senge's (1991) theory of the learning organization, which combines systems thinking and organizational learning. Wen (2014) studied the 10 characteristics that make up the learning organization. These strategies promote communication and organizational performance and include learning, intelligence, action, innovation, sustainability, value, communication, leadership, systems, and practice.

The concept of learning organization encompasses total quality management, continuous improvement, and adaptive learning (Senge, 1991). In a learning organization, leaders must embrace and encourage a shared vision, generative learning, and systems thinking. Wilson and Beard (2014) identified organizational learning as an important component for successful knowledge management (KM) implementation. Two primary concepts surrounding organizational learning exist, including information and interactive perspective. While the information perspective addresses the need for an organization to encourage learning and flexibility, the interactive perspective refers to the cooperation and communication between employees within the organization. These concepts relate to this knowledge management study because they highlight the importance of developing and sharing knowledge throughout an organization. These concepts promote flexibility, innovation, and competitiveness.

Opengart (2015) applied the concept of the learning organization to assess the productivity of supply chains. Opengart found overlapping themes between the learning organization and SCM, including continuous improvement, organizational learning, and organizational flexibility and adaptability. Two key components of SCM are collaboration and communication, which are also encouraged under the learning organization. Employees within a learning organization foster their ability to learn and adapt, which are essential traits to achieve a smooth supply chain.

Ahern, Byrne, and Leavy (2015) researched the benefits of developing consistent learning models on team and organizational levels. The learning organization fosters continuous learning, which allows employees to revisit items they have already explored. In this way, employees can expand and improve upon existing ideas and procedures. Employees that take this analytical look at current knowledge can develop more streamlined solutions to their existing complex problems.

Pokharel and Choi (2015) studied the impact of the learning organization on organizational success. Pokharel and Choi found that organizations that promote a consistent culture and a KMS experienced increased consistency and reliability. These factors contribute to organizational performance and effectiveness. Pokharel and Choi concluded that the learning organization encourages enthusiasm and participation.

Leadership and Organizational Culture

One barrier to the implementation of a KMS is the complexity of the information system. In order to maximize the investment, an organization requires collaboration between the business and technology sides of the organization. Lee, Park, and Lee

(2015) developed a model to determine the most influential components for implementing an effective information system. Lee et al. found that although technological expertise and communication were contributing factors, the most influential components were knowledge sharing and the organizational culture. Having a foundation of trust and openness in place allows organizational leaders to better define their needs and desires, molding their KMSs to fulfill their vision.

Leadership support has proven to be critical to the success of a KMS. Micić (2015) studied the qualities a leader should possess in order to influence the process of knowledge management. First, a leader should value both the sharing of current knowledge and the creation of new knowledge. This will contribute to the value creation of the organization. Charismatic leaders and transformational leaders can both effectively support a KMS. According to Micić, charismatic leaders garner respect, foster personal relationships, and develop and articulate a vision successfully. Transformational leaders believe in life-long learning, creativity, continuous improvement, and the exchange of knowledge among teams.

Durmusoglu, Jacobs, Nayir, Khilji, and Wang (2014) researched the relationship between rewards and knowledge shared and gained. Organizational knowledge is such a valuable asset because it is unique to each organization and difficult to imitate by other firms. Therefore, an organization that can successfully create and share knowledge can gain an advantage over its competitors. Therefore, it is vital that firms encourage employees to participate in the KMS. Durmusoglu et al. found that a supportive organizational culture and leadership influence the knowledge sharing of its employees.

In addition, rewards alone could influence learning, regardless of the supportive level of the culture.

Zawila-Niedzwiecki (2015) focused on knowledge collection, formulation, and utilization. Zawila-Niedziwiecki found that organizational culture stimulated knowledge creation. Organizations can support knowledge absorption through training, communication, and benchmarking research. Knowledge dissemination occurs through a KMS, codification, and organizational culture. Zawila-Niedzwiecki extended the model to include knowledge protection using information systems and patenting.

Tongo (2015) studied the conditions that are most favorable for encouraging collaboration and teamwork. A KMS works best in organizations that encourage sharing and cooperation. Therefore, the factors that encourage collaboration could also positively impact the effectiveness of a KMS (Tongo, 2015). Tongo found that one of the driving forces for teamwork is finding a common motivational force. If employees share by a common goal, they may be more willing to share and work together. Therefore, a consistent KMS and culture and a unifying mission may foster collaboration and knowledge sharing.

Al Saifi (2015) proposed a model for studying the impact of organizational culture on knowledge management and organizational performance. Al Saifi defined knowledge as an evolving collection of experiences, values, information, and insight. KMS allows business leaders to create, share, and apply knowledge that is relevant to the organization. Business leaders establish an organizational culture to create the context with which to share knowledge and shape the way individuals create and distribute

knowledge. In addition, culture contains guidelines regarding which knowledge is significant and how to share it.

Mojibi, Hosseinzadeh, and Khojasteh (2015) studied the cultural traits of involvement, consistency, adaptability, and mission and the relationship to knowledge management processes. Organizations that support involvement encourage employees to actively participate in the organization and feel connected to the organizational values. Consistency promotes coordination and a common mindset. Adaptable organizations are open to continuous improvement and an organizational mission gives employees a clear purpose and direction. Mojibi, Hosseinzadeh et al. found a significant correlation between these cultural traits and knowledge management processes.

Jasimuddin and Zhang (2014) researched the challenges that organizational culture can present to knowledge management practices. Specifically, tacit knowledge is difficult to disseminate throughout an organization. However, tacit knowledge is difficult to access by competition. Conversely, explicit knowledge is accessible to employees, but it is more vulnerable to access by competition. Jasimuddin and Zhang developed a model to match organizational culture to knowledge management. In this way, organizations can encourage efficient knowledge creation, storage, and communication.

Knowledge Management and Organizational Performance

Intellectual capital is valuable to an organization's competitive advantage (Akanbi, 2016). Effective knowledge management can encourage product development, client growth, and profit growth. Akanbi found a significant positive relationship between KMS and customer capital and innovation capital. In addition, the factors of customer capital and innovation capital positively influence perceived organizational performance and competitive advantage.

Park and Kim (2015) studied the way knowledge sharing affects the organizational change components of tasks, structure, technology, and personnel. KMS influences tasks such as product development, research and development, and teamwork. Organizational culture, decision-making processes, and employee satisfaction were the structural components of the KMS' impact. KMS influence people by increasing trust, productivity, and collaboration. Technology influences come from the increased innovative potential from KMS (Park & Kim, 2015).

In a global market, competition is fierce and knowledge could become a vital strategic resource for an organization (Khuran et al., 2016). However, Khuran et al. (2016) found that in order for a KMS to be effective, it should be coordinated with the overall organizational strategy. Leadership and culture should be consistent with the KMS and overall knowledge-sharing processes. When these all align, KMS has a positive impact on overall organizational performance.

Knowledge management and an effective KMS could help an organization remain competitive in a globalized market (Lin, 2015). KMS could contribute to employee

effectiveness, productivity, and knowledgeable. Lin (2015) researched the concept of knowledge management orientation (KMO) and its impact on organizational effectiveness. KMO is the likelihood of an organization to enhance and share existing knowledge. In addition to technology, an organization requires continuous checks and measures to monitor the results. Lin found that knowledge sharing contributes to streamlining internal processes and knowledge absorption positively influences customer satisfaction.

Shazhad et al. (2016) studied the impact of KMS on organizational performance and creativity. In a global market, knowledge is a strategic source of competitive advantage. However, in order to maximize the impact on organizational performance, Shazhad et al. suggested that leaders should link the KMS to organizational strategy. In addition, organizations should have a clearly defined knowledge strategy that shape the organizational learning and ascertain the firm's resources. Shazhed et al. found that KMS positively influence organizational creativity and innovation, which leads to improved organizational performance.

Knowledge is a source of advantage and value for organizations (Wu & Chen, 2014). Investing in knowledge resources, such as technology, learning, and employees, can benefit a firm. However, if leaders do not link the KMS to organizational culture or strategy, the organizational performance may not benefit from the investments in KMS. If the KMS, strategy, and culture are all consistent, an organization can experience improvements in value and financial performance (Wu & Chen, 2014).

Transition and Summary

In Section 1, I introduced organizational knowledge and the technology that organizations use to capture, analyze, and share this knowledge. Section 1 contained explanations of the problem statement, nature of the study, research question, and conceptual framework. I presented the interview questions that I will use to gather my data and the definition of terms subsection to introduce key terms in this proposed study. In the significance of the study subsection, I highlighted effective methods for incorporating KMS into overall organizational strategy. The literature review included an examination of knowledge conversion theory, RBV theory, and the theory of the learning organization. I continued with a discussion of the influence of organizational culture and strategy on KMS effectiveness.

In Section 2, I introduce the project plan and discuss the purpose of the study and the research method and design. I provide details about the participants, the population and sampling, and the role of the researcher. I discuss ethical implications, review the way I will collect and analyze data, and discuss the reliability and validity of the research.

In Section 3, I provide an overview of the study, present the findings, and consider professional applications. I provide details regarding the study outcome and present implications for social change, recommendations for action, and recommendations for future study. I then present my personal reflections and a conclusion.

Section 2: The Project

In this section, I review the purpose statement, discuss the role of the researcher, and describe the participants and the research method and design. I also provide information on the population and sampling, ethical research procedures, data collection instruments and techniques, and data organization techniques. Following is a discussion of the data analysis and reliability and validity. The section concludes with the transition and summary subsections.

Purpose Statement

The purpose of this qualitative multiple case study was to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. The population consisted of financial service industry leaders, located in the northeastern United States, possessing successful experience using strategies to incorporate a KMS into their organizational strategy. The implications for positive social change include the potential for increased revenue that leaders could use to make charitable contributions to further the development of local communities. In addition, leaders' use of lean processing could reduce environmental waste, which would benefit the local community because its residents could enjoy a cleaner environment.

Role of the Researcher

In qualitative studies, the researcher becomes an instrument of data collection by conducting interviews to answer the overarching research question of a study (Gentles, Charles, Nicholas, Ploeg, & McKibbon, 2016). For this qualitative research study, I served as the primary research instrument because I collected and analyzed data and

reported the findings, as described by Dresch, Lacerda, and Miguel (2015). As the primary research instrument, I collected data by conducting semistructured interviews and analyzing organizational documents, such as organizational white papers, organizational culture and mission statements, and annual reports. In conducting my study, I consulted with industry leaders to identify potential candidates to interview and established a working relationship with study participants. I used the methods that Singh (2015) recommended by asking probing, open-ended questions to encourage deeper levels of response by participants. I used active listening, paraphrasing, and other activities that allowed me to build rapport and dialog with participants to help me answer the overarching research question for this study. I conducted the interviews in person to be able to observe facial expressions and body language, as recommended by several scholars (Erlingsson & Brysiewicz, 2013).

Researchers also play a critical role during the data collection and analysis stages (Yin, 2018). Illustrating this point, once I transcribed the interviews, I analyzed the data collected and identified themes, as recommended by Houghton, Murphy, Shaw, and Casey (2015). I also analyzed participants' nonverbal cues during the interviews, such as facial expressions and body language, as recommended by Rowley (2014).

Berger (2015) argued that researchers possessing experience related to the phenomenon under investigation develop a deeper, more meaningful understanding of the study. My prior experience as a data and business systems analyst at financial firms for the past 12 years allowed me to understand the challenges and benefits of knowledge management. I worked in both the business and technological areas of the companies.

Transitioning retirement plan information from other providers, for instance, allowed me to gain insight into the ways other organizations share information internally and throughout the industry. My role prepared me for gathering and analyzing data in this study. In addition, as part of my prior work responsibilities, I asked probing questions to obtain all the relevant procedural information needed to administer group pension plans. I obtained a holistic understanding of the entire process and worked with clients, technology, and internal business partners to ensure the transition was efficient. I developed connections with industry members that helped me generate the sample population for this study.

In order to meet ethical standards, researchers should consult all available guidelines, codes, and regulations enforced by professional associations and review boards (Wong & Hui, 2015). According to Hey (2015), researchers are obligated to adhere to ethical guidelines, as provided by the Belmont Report protocol (National Commission for the Protection of Human Subjects in Biomedical and Behavioral Research, 1979). The three basic ethical principles of research with human subjects are respect for persons, beneficence, and justice (National Commission for the Protection of Human Subjects in Biomedical and Behavioral Research, 1979). Researchers following the *respect for persons* principle recognize study participants' autonomy, including reduced autonomy (National Commission for the Protection of Human Subjects in Biomedical and Behavioral Research, 1979). The researcher has the responsibility of determining the degree of any external control or influence a participant could be under and adjust accordingly (National Commission for the Protection of Human Subjects in

Biomedical and Behavioral Research, 1979). Researchers strive to maximize the benefits of the participant interviews while also adhering to the *beneficence* principle, which requires that researches take every precaution to bring no harm to participants (National Commission for the Protection of Human Subjects in Biomedical and Behavioral Research, 1979). The *justice* principle requires researchers to warrant fair and equal treatment to participants in terms of potential benefits or burdens associated with the research study (National Commission for the Protection of Human Subjects in Biomedical and Behavioral Research, 1979).

The Belmont Report includes guidelines for applying ethical principles, such as the attainment of informed consent from participants, assessment of risks and benefits, and securement of a comprehensive sampling of interview subjects (National Commission for the Protection of Human Subjects in Biomedical and Behavioral Research, 1979. To garner informed consent, I fully disclosed information about the study to the participants, ensured comprehension of this information, and guaranteed that participation was voluntary, following Belmont Report guidelines (National Commission for the Protection of Human Subjects in Biomedical and Behavioral Research, 1979). My duty as the researcher was to follow the ethical principles defined in the Belmont Report protocol, the requirements of Walden University's Institutional Review Board (IRB), and any additional requirements of the participating organizations. I did not begin the collection of data until I obtained IRB approval. I also communicated the principle of informed consent to the participants and obtained signed informed consent forms to ensure that my actions were ethical. Once I commenced with the research study, I

reminded participants that their participation was voluntary and that they could withdraw at any point during the study.

I also treated each participant impartially. In qualitative research studies, researchers may allow their own underlying beliefs and perceptions to influence the evidence and analysis (Toews et al., 2016). Researchers must take every precaution against confirmation bias, which occurs when researchers favor evidence that validates their underlying beliefs more than evidence that does not confirm their preexisting convictions (Stratton, 2015). Grieb, Eder, Smith, Calhoun, and Tandon (2015) suggested that researchers use member checking to protect against bias. Member checking provides participants with the opportunity to evaluate the researcher's interpretation of participants' responses to interview questions (Grieb et al., 2015). In order to mitigate bias in this study, I provided participants with my interpretation of their responses to interview questions for verification purposes.

I used an interview protocol (see Appendix A) as a reference to guide me through the interview process. An interview protocol includes items such as interview procedures, a script for the introduction and conclusion, guidelines for obtaining participant consent, and interview questions (Castillo-Montoya, 2016). Researchers use an interview guide to ensure consistency across all interviews (Roulston, 2016).

Participants

Several challenges existed that I needed to face in order to begin my data collection. These challenges included finding suitable participants, gaining access to the organization, and securing consent from eligible participants (Delost & Nadder, 2014).

Participants were eligible if they have experience and knowledge relating to the phenomenon under investigation (Yin, 2018). Newington and Metcalfe (2014) established eligibility requirements as a way to guarantee that participants' experiences align with the overarching research question. Eligibility criteria include parameters such as age, employment status, and experience (Newington & Metcalfe, 2014). Gaining access to participants and organizations is a challenge for researchers (Newington & Metcalfe, 2014). To overcome this challenge, Mealer and Jones (2014) suggested developing an understanding of the target population and reaching out to key organizational personnel. Baskerville and Wood-Harper (2016) ascertained that directly approaching participants reveals the research assumptions and the research setting. The first step I took prior to data collection was to identify appropriate participants. For this study, I looked for participants possessing successful experience using strategies to incorporate a KMS into their organizational strategy. All participants had at least 7 years of successful experience and knowledge related to a KMS. I used my connections in the professional and academic world to gain access to potential participants for this study through networking, media, and referrals. By working directly with organizational personnel, I disclosed my intent to conduct the study to participants.

Researchers establish a working relationship with study participants to gain their trust and acceptance (Bell, Fahmy, & Gordon, 2016). Pietkiewicz and Smith (2014) and Robinson (2013) recommended full exposure regarding researcher's experience, intent, and methods as a means to encourage participation. Robinson (2013) suggested developing a rapport in order to gain trust and acquire deeper levels of participation. I

gained participants' trust and acceptance by establishing a working relationship with them. I was forthcoming with my professional experience with the topic. In addition, I ensured full disclosure regarding my intent and my methods for conducting the interviews. I also ensured that I would not communicate any identifying information in the study to protect the personal and professional identity of the participants. In order to assure ethical protection of the participants, I gained full approval of Walden University and the IRB prior to conducting any interviews. In addition, I consistently reminded participants that their participation was voluntary and that they could withdraw at any point during the study. I engaged with participants regularly to develop a rapport. Through gaining the trust of the participants, I encouraged a productive and in-depth interview and captured relevant and insightful information.

Choosing the appropriate research design will aid in the alignment between the overarching research question and the participants (Baskerville & Wood-Harper, 2016). Selecting participants meeting the eligibility criteria ensures that participants possess the relevant experience and knowledge to aid the researcher in answering the overarching research question (Delost & Nadder, 2014). Pietkiewicz and Smith (2014) suggested evaluating participants prior to the interview to ensure they possess the required experience and that they will effectively communicate their knowledge. I selected an appropriate research design for this study to ensure alignment between the overarching research question and the participants in this study. I ensured participants met the eligibility criteria, that participants possessed the relevant knowledge and experience related to a KMS and organizational strategy. Therefore, I was able to fully scrutinize the

participants prior to the interviews in order to develop rapport and to ensure participant eligibility and relevance.

Research Method and Design

Researchers consider the overarching research question of a study to determine the appropriate research method and design (Bettis et al., 2014). The available research methods are quantitative, qualitative, and mixed methods. The choice for the research design stems from the research method. The following sections contain my reasoning for the research method and design chosen for this study.

Research Method

I used the qualitative research method for this study. The nature of the research question should be a factor in determining the appropriate research method (Lewis, 2015). When using the qualitative research method, a researcher is able to conduct the research study in a natural setting, which can provide insight into the real-life implications of the research topic (Yin, 2018). In new fields of study, researchers are able to identify themes and trends by asking open-ended questions (Veltire, Lim, & Miller, 2014). A qualitative study is exploratory because the researcher is able to observe the practices and experiences of the research study subjects (Guercini, 2014). I used the qualitative research method for this study because I conducted this research study in a natural setting and gained an improved understanding of the real-life implications of using strategies to incorporate a KMS into organizational strategy effectively.

Fernandes, Ward, and Araujo (2015); Mueller (2014); and Turner et al. (2014) explored the relationship between KMS and organizational culture and validated the use

of the qualitative research method for investigating strategies for incorporating KMS into an organization. Fernandes et al. (2015), Mueller (2014), and Turner et al. (2014) demonstrated that researchers use the qualitative research method to expand upon KMS strategies in an authentic setting, as opposed to testing specific hypotheses. Gaining a better understanding of the relationship between KMS and organizational strategy adds value to business process improvements and social change (Gioia, Corley, & Hamilton, 2013). Business leaders use KMS in financial services firms if integrated effectively into the overall organizational strategy. The qualitative research method is the appropriate research method for gaining a better understanding of a concept within the situational framework of organizational research (Cornelissen, 2016).

Researchers use the quantitative research method to explore KMS, including the work of Rajab and Arisha (2013), Wang et al. (2014), and Zhang et al. (2014). Quantitative researchers rely on accurate, consistent data collection to identify relationships between two or more variables. In quantitative research, researchers focus on commonalities and cause-and-effect relationships to prove or disprove hypotheses (Bettis et al., 2014). According to Baskerville and Wood-Harper (2016), researchers account for the nature of the overarching research question when determining a research design. Therefore, quantitative research was not suitable for this study because I was not seeking to identify relationships between two or more variables. I did not attempt to prove or disprove hypotheses. The purpose of this multiple case study was to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively.

In a mixed-methods research study, the researcher utilizes a combination of qualitative and quantitative methods (Pluye & Hong, 2013). Researchers using the mixed-methods research methodology must meet the requirements of both the quantitative and qualitative research methodologies (Venkatesh, Brown, & Bala, 2013). The mixed-methods researcher employs both inductive and deductive reasoning to address both exploratory and confirmatory research questions (Lewis, 2015; Pluye & Hong, 2013; Venkatesh et al., 2013). I did not need the quantitative design components to answer my exploratory research question. Therefore, a mixed-methods research methodology was not suitable for this study.

Research Design

I used a multicase study research design to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. The research designs under the qualitative research method include the phenomenological design, which focuses on a small group's experience regarding a specific event (Budd & Velasquez, 2014). Additional qualitative research designs include ethnographic, which focuses on the culture within a community (Natalia & Luciano, 2014), and case study, through which a researcher explores the *how* and *why* of a particular phenomenon (Lewis, 2015).

Researchers use the case study design to bridge business research with business practice (Grandon, 2014) and to develop original understandings of relationships and strategies (Pedrosa et al., 2012). Researchers use observations, interviews, and document analyses in case study research (Mueller, 2014). Case studies are suitable for answering

how and *why* questions through interviews, observations, and document analysis (Lewis, 2015). Researchers conduct face-to-face semistructured interviews when administering a comprehensive exploration of participant experiences of a phenomenon (Cronin, 2014). A researcher looking to gather a range of views on a specific topic conducts semistructured interviews (Cronin, 2014). During document review, the researcher evaluates and examines documents and publications produced by the participants' organizational employees relevant to the phenomenon under investigation (Houghton et al., 2015). Case study research is ideal for studying a phenomenon it a natural setting (Guercini, 2014). Therefore, a case study design was an appropriate research design for this study to collect data from financial services industry leaders using semistructured interviews and document review. I used the case study research design because I explored the *how* and *why* of a particular phenomenon which, in this case study, was the exploration of strategies financial service industry leaders use to incorporate a KMS into their organizational strategy.

When using ethnography, the researcher spends an extended period within a cultural community to observe shared behavioral patterns, beliefs, and language (Lewis, 2015). The researcher collects data using field notes, observation, and interviews (Mueller, 2014). An ethnographic design requires an in-depth shadowing to develop a cultural understanding (Natalia & Luciano, 2014). As I did not study shared behavioral patterns or beliefs of financial services leaders, ethnography was not an appropriate research design for this study.

When using a phenomenology, the researcher focuses on a small group's experience regarding a specific event (Budd & Valasquez, 2014). Researchers using a phenomenology focus on the exploration of the study participants' shared experiences (Budd & Velasquez, 2014). A phenomenology is appropriate for studies where the researcher examines collected data to find the fundamental nature of the participants' experiences and their significance (Mueller, 2014). In my study, I explored strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. I did not research a shared experience of a phenomenon and, consequently, the phenomenology was not well suited for my study.

There is no definitive set of guidelines for precise data saturation in qualitative research (Fusch & Ness, 2015). The standard practice is to collect data until no new themes develop from new data (Fusch & Ness, 2015; Houghton et al., 2013; Houghton et al., 2015). In order to reach data saturation, researchers collect data past the saturation point to ensure data redundancy (Fusch & Ness, 2015; Houghton et al., 2013; Houghton et al., 2015). I conducted semistructured interviews until no new themes emerged from the data collected. To ensure that I reached data saturation using data collected from the participants of this study, I continued to ask interview questions to ensure data redundancy.

Population and Sampling

In order to gather purposeful data, researchers must sample from a collection of participants with knowledge and experience related to a particular subject (Robinson, 2013). The fundamental reason for purposeful sampling is to utilize specifically selected

participants to provide researchers with rich data to gain an understanding of the phenomenon under investigation (Cleary, Horsfall, & Hayter, 2014). Setting participant criteria as a requirement for the study helps ensure the data collected will be meaningful (Marshall, Cardon, Poddar, & Fontenot, 2015). I used purposeful sampling to select participants for this study.

Widely accepted guidelines for setting a suitable sample size for qualitative research are not available (Palinkas et al., 2015). However, in qualitative research, the intent is to gain a comprehensive understanding of the phenomenon rather than the general data trends (Whitehead & Whitehead, 2016). Therefore, the sample size is usually relatively small (Leung, 2015). In addition, the researcher must consider feasibility and practicality when determining sample size (Lewis, 2015). Despite the small sample size, qualitative researchers should declare a minimum number of study participants (Palinkas et al., 2015**)**. If needed, to ensure saturation, the researcher can broaden the sample size at a later stage (Anney, 2015). Setting and following criteria for sample participants can help the researcher maximize the sample and ensure consistency (Leung, 2015). In this study, I ensured that my sample included a population representing a variety of experience, exposure, age, gender, and skills related to KMS and organizational leadership. My sample included five leaders from four different financial services organizations. I did not need to broaden the sample size as I achieved data saturation.

Data saturation is an accepted measure regarding the quality of qualitative research (Yin, 2018). O'Reilly and Parker (2013) argued that researchers ensure data

saturation by searching for emerging themes during data collection, reflecting on the data, and continuing to question participants until no new themes emerge. Data saturation occurs when the addition of new participants to the study would not produce any new or useful data (Lewis, 2015). I searched for emerging themes during data collection, reflected on the data, and continued to question participants until no new data emerged. I reached data saturation with five participants. Therefore, I did not need to recruit additional participants and did not need to conduct additional interviews.

In order to ensure that participants meet the requirements for participation in a study, researchers should set participant eligibility criteria (Palinkas et al., 2015). The requirements include experience and knowledge regarding the phenomenon under investigation (Whitehead & Whitehead, 2016). The researcher should minimize bias when building the sample population, including any selection bias by the researcher, which would exclude participants from the study based on certain criteria (Leung, 2015). Consent bias takes place when selected participants decline participation in the study (Marshall et al., 2015). Following the protocol of proper research design helps the researcher reduce these biases (Yin, 2018). When selecting my sample population, I considered participants' experience with a KMS and the financial services industry. Participants were eligible if they had at least seven years of successful experience in the financial services industry as leaders or managers.

With the appropriate setting, the researcher influences the content and depth of the data collected (Houghton et al., 2013). An appropriate interview setting is a location that is available, accessible, comfortable, and private (Anyan, 2013) to avoid

interruptions (Wolgemuth et al., 2014). I conducted the interviews in conference areas available and accessible at the firms to ensure that study participants felt that the room was private and comfortable.

Ethical Research

In order to protect participants from unethical research practices, the researcher should obtain informed consent (Mealer & Jones, 2014). Researchers must inform participants about the relevant components of the study, confirm that the participants comprehend the information provided, and ensure that participation in the study is voluntary (Berger, 2015). Researchers include the description and purpose of the research procedure as part of the information included in the informed consent (Babb, Birk, & Carfagna, 2017). In addition, researchers should identify possible risks and benefits to the research participants. There should be opportunities for participants to ask for clarification or additional information throughout the research process (Robinson, 2014).

Prior to participation in the study, participants must complete and sign the informed consent form (Babb et al., 2017). However, researchers must clearly explain that this consent does not oblige the participants to complete the study, as participants must have the option to withdraw consent at any stage without fear of consequences (Babb et al., 2017). Participants should understand they have the right to withdraw without requiring a reason (Mealer & Jones, 2014). I did not begin interviews for this study until I fully explained the informed consent process and obtained the complete and signed informed consent forms.

In an effort to garner participants, researchers may decide to offer participation incentives such as gift cards (Palinkas et al., 2014). However, incentives may influence the voluntary aspect of the research (Robinson, 2014). I did not offer participation incentives for my study. Eligible participants participated to share their experiences regarding a KMS.

The principles of the Belmont Report Protocol are beneficence, justice, and respect for persons (Babb et al., 2017). In adhering to these principles, researchers treat participants as independent individuals (U.S. Department of Health & Human Services, 1979). It is the responsibility of the researcher to protect the participants from unethical research practices (Babb et al., 2017). In order to ensure the research and research design are ethical, I adhered to the guiding principles of the Belmont Report Protocol. In addition, to protect the participants, I followed any code of conduct established by the participating organizations. I obtained IRB approval before commencing the research study to ensure that I adhered to all IRB ethical standards. The IRB approval number for this study is 03-05-18-0326013.

Houghton et al. (2013) described best practices researchers adopt to protect participants during and after interviews. These best practices during the interview include clearly stating the purpose of the study, obtaining informed consent, and only collecting information pertinent to the study. After the interview, the researcher should only use the data collected for the purpose of the study, keep these data secure, and properly dispose of the data (Houghton et al., 2013). Once I conducted my interviews, I codified the data to ensure confidentiality. I refrained from using any identifying

information such as name, location, or organization's name. Any demographic information collected was strictly for the purpose of the study, and I did not make this information available to anyone else. All data collected were stored on a flash drive. Once the 5-year period after the interview completion expires, I will physically destroy the flash drive and any additional information related to the participant data. Researchers should ensure confidentiality by refusing to share participants' information (Sanjari, Bahramnezhad, Fomani, Shoghi, & Cheraghi, 2014), keeping the participants' identities confidential (Sanjari et al., 2014). I protected the confidentiality of my research participants by codifying all personal and identifying components of my research participants.

Data Collection Instruments

Research instruments are measurement tools for gathering data from subjects (Yilmaz, 2013). Lincoln and Guba (1985) introduced the concept of the researcher being the primary research instrument of a study. Researchers (Babb et al., 2017; Mueller, 2014; Palinkas et al., 2015) concurred that, in qualitative research, the researcher becomes the research instrument. In a case study, the researcher gathers data from the research subjects through interviews, observations, and document analysis (Mealer & Jones, 2014).

Through interviews, the researcher develops an understanding of the phenomenon under investigation through the point of view of the participants (Fusch & Ness, 2015). These interviews can be structured, semistructured, or unstructured (Dresch et al., 2015). In qualitative research, researchers often conduct face-to-face, semistructured interviews

to ask follow up questions to develop interpretative context (Cronin, 2014). In case studies, these semistructured interviews consist of pre-determined open-ended *how* and *why* questions, which allow researchers to ask additional probing questions (Lewis, 2015). In qualitative research, the term *rich data* means complex and revealing information pertaining to the research question (Doody & Noonan, 2013). Using semistructured interviews allows the researcher to uncover rich data and discover new themes (Doody & Noonan, 2013).

As the primary data collection instrument, I conducted semistructured interviews, obtaining rich data pertaining to a KMS and organizational leadership. I used the interview protocol (see Appendix A) to direct the interviews. I asked participants the same interview questions (see Appendix B), and allowed for additional, probing, and follow up questions. In addition, I requested the participants provide additional parting thoughts in an effort to gain additional insights or experiences not covered during the interview, as recommended by several scholars (Doody & Noonan, 2013; Fusch & Ness, 2015). The interviews lasted an average of 30 minutes.

In qualitative research studies, researchers may allow their own underlying beliefs and perceptions to influence the evidence and analysis (Toews et al., 2016). As the primary research instrument, researchers take every precaution against influencing the results of the research with personal bias (Stratton, 2015). Grieb et al. (2015) suggested that researchers use researcher reflexivity and member checking as a means to protect against bias. Member checking provides participants with the opportunity to evaluate the researcher's interpretation of participants' responses to interview questions (Grieb et al.,

2015). Through reflexivity, the researcher records and reflects upon thoughts and decisions pertaining to the data collected (Stratton, 2015). To improve the transparency and trustworthiness of this study, I provided participants with my interpretation of their responses to interview questions and asked participants to verify their responses.

Researchers also use document analysis as a data collection technique (Mueller, 2014; Pedrosa et al., 2012). During document review, the researcher evaluates and examines documents and publications produced by the participants' organizational employees relevant to the phenomenon under investigation and allows the researcher to quantify the collected data (Houghton et al., 2015). In addition, document review could help the researcher verify spelling of names or event details (Houghton et al., 2015). The format of the qualitative data in organizational documents can be textual, graphical, or pictorial (Pedrosa et al., 2012). Researchers use document analysis in conjunction with semistructured interviews to further explore the phenomenon under investigation (Pedrosa et al., 2012) and increase rigor of the study because interviewing and document analysis enable the researcher to perform data triangulation (Mueller, 2014). I conducted methodological triangulation by analyzing company documents related to KMS implementation and organizational leadership strategies in conjunction with participants' responses to semistructured interviews to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively.

Data Collection Technique

Interviews are a widely accepted data collection method because the researcher develops an understanding of the phenomenon under investigation through experiences of

the participants (Fusch & Ness, 2015). These interviews can be structured, semistructured, or unstructured (Dresch et al., 2015). In qualitative research, researchers often ask open-ended questions (Cronin, 2014). Semistructured interviews begin with predetermined open-ended questions, which allow researchers to ask follow-up questions in which participants elaborate on their experiences in their own words (Lewis, 2015). This elaboration allows the participants to speak to their own areas of expertise when revealing information related to the research phenomenon (Lewis, 2015). In qualitative research, the term *rich data* means complex and revealing information pertaining to the research question (Doody & Noonan, 2013). Using semistructured interviews allows the researcher more flexibility with the line of questioning in order to uncover rich data and discover new themes (Doody & Noonan, 2013). Researchers usually record and transcribe interviews (Lewis, 2015). I conducted semistructured face-to-face interviews. I recorded and transcribed the interviews to ensure accuracy and to conduct a precise analysis.

Interviewing as a data collection method has various advantages for participants and researchers. In semistructured interviews, participants have the opportunity to elaborate on their answers (Bell et al., 2016). Pietkiewicz and Smith (2014) recommended answering any clarifying questions. Robinson (2013) recommended full exposure regarding a researcher's experience, intent, and methods as a means to encourage participation. Robinson (2013) suggested developing rapport with participants to acquire deeper levels of participation. I conducted the interviews face-to-face so that I could observe non-verbal cues and reactions. I engaged with participants regularly to

develop rapport with them. By gaining the trust of the participants, I encouraged productive and in-depth interviews and captured relevant and insightful information.

Disadvantages to using interviews as a data collection method exist, which can affect the data quality (Deakin & Wakefield, 2014). One disadvantage is the level of comfort of the participants (Bevan, 2014). Participants often perceive interviews as invasive, and participants may not be happy with the idea of recording their responses (Deakin & Wakefield, 2014). Additionally, participants may attempt to please the researcher and provide answers they assume the researcher would rather hear, which produces bias in the study and reduces the authenticity and honesty of the data collected (Deakin & Wakefield, 2014). An additional common disadvantage is that a novice researcher may struggle to lead the interview effectively due to a lack of experience and the researchers' views or body language may influence the participants' responses (Doody & Noonan, 2013). In order to reduce these disadvantages, I remained cognizant of my own body language, stressed the value of honest responses from the participants, and monitored the body language of the participants for signs of discomfort.

Researchers use pilot studies to test interview protocols and acquire participant reactions to the interview structure and the participants' experiences (Stubb, Pyhalto, & Lonka, 2014). Kannan and Gowri (2015) suggested that pilot interviews are appropriate for research using clinical trials and large-scale studies. Friedman (2013) proposed a practice interview as an alternative for smaller studies. Given the fact that I only interviewed five financial services firm leaders, I did not conduct a pilot study. Instead, I

conducted peer-reviewed practice interviews with feedback before beginning my interviews.

The practice of member checking is to provide participants an opportunity to review the researchers' interpretation of participants' answers accuracy (Grieb et al., 2015). In addition to correcting any inaccuracies, participants could offer clarifying information (Stratton, 2015). Researchers use member checking to improve the integrity of the data (Grieb et al., 2015). However, drawbacks exist to member checking. For example, the researcher should not assume that no comments from participants equates to consent; instead, no comments from participants could mean the participants never reviewed the researchers' interpretation of participants' answers or were uncomfortable with expressing disagreement (Bevan, 2014). To improve the transparency and trustworthiness of this study, I provided participants with my interpretation of their responses to interview questions and asked participants to verify their responses. I also encouraged honest feedback.

Researchers also use document analysis as a data source (Mueller, 2014; Pedrosa et al., 2012). Researchers use document analysis in conjunction with semistructured interviews to complement and enhance the information obtained from interviews (Pedrosa et al., 2012) and increase rigor of the study because interviewing and document analysis enable the researcher to perform data triangulation (Mueller, 2014). In addition, document review could help the researcher verify specific information for the case study such as spelling of names or event details (Houghton et al., 2015). Researchers use document analysis to uncover additional themes relevant to the phenomenon under

investigation (Mueller, 2014). Document types that could be relevant to the phenomenon under investigation may include financial statements and annual reports (Dresch et al., 2015).

Risks to conducting document analysis exist, such as encountering an interested witness that manipulates a document to influence the outcome (Mueller, 2014). In order to reduce this risk, the researcher should obtain, when possible, the purpose for the creation of the company documents (Dresch et al., 2015). In addition, the researcher may have difficulty obtaining access to company documents that are relevant to the study (Houghton et al., 2015). I conducted methodological triangulation by analyzing company documents related to KMS implementation and organizational leadership strategies in conjunction with participants' responses to semistructured interviews to explore strategies financial service industry leaders employ to incorporate a KMS into their organizational strategy effectively. I asked the appropriate individuals for access to documents once I received IRB approval for the proposed study. The document review included annual reports, financial statements, and best practices related to a KMS and organizational culture. I scanned and stored selected documents with the rest of the collected data for review and analysis.

Data Organization Techniques

Prior to data analysis, qualitative researchers should create an appropriate system for data organization (Houghton et al., 2013). Organized data are more likely to yield rigorous research findings (Anney, 2015). Qualitative researchers compile data in an orderly approach, such as in a database (Mueller, 2014). Once the researcher orders the

data, the researcher begins to ascertain a consistent form (Anney, 2015). I conducted semistructured, face-to-face interviews with five leaders from the financial services industry using the interview questions developed (see Appendix B).

Mueller (2014) suggested recording participant responses and nonverbal reactions. Houghton et al. (2013) recommended assigning unique participant codes to protect participant confidentiality. Additional confidentiality measures include changing identifying information, such as participant names and places (Anney, 2015). When I conducted my interviews, I wrote the participants' comments and noted the nonverbal cues. I assigned identifiers to participants that consisted of the letter C and a number for the company and a letter P and a number for the individual. Because Company 1 had two participants, the participants' codes are as follows: C1P1, C1P2, C2P3, C3P4, C4P5. I then reviewed my notes, removed any identifying participant information, and replaced it with the applicable participant code.

The first step in organizing the data should be to convert all paper documents to electronic documents through scanning (Zupic & Čater, 2014). De Massis and Kotlar (2015) recommended storing data relevant to the study on an external hard drive. This information can include electronic transcripts, notes, and observations. Notes related to a specific participant will exhibit the unique participant identification number (De Massis & Kotlar, 2015). Zupic and Čater (2014) suggested assigning a document identification number and an annotated bibliography to all documents as a means to improve indexing and recovery. In addition, Zupic and Čater recommended filing of the electronic documents within a reserved folder on the external hard drive. Upon storing data

electronically, the researcher could use a computer-assisted qualitative data analysis software (CAQDAS) to assist with the organization and analysis of the data (Woods, Paulus, Atkins, & Macklin, 2015). Although the researcher should be the primary data analysis tool, the researches might use CAQDAS to organize the data more efficiently (Woods et al., 2015). An example of CAQDAS is DeDoose, which is an inexpensive, user-friendly, secured, web application that works well with a small participant set for qualitative research studies (Talanquer, 2014).

In this study, I scanned all paper documents and assigned unique identification codes to participants. I used an annotated bibliography to simplify indexing and accessing. I filed all electronic documents on an external flash drive. I used DeDoose to import, store, and analyze all electronic data I collected.

Houghton et al. (2013) emphasized the importance of a reflective journal, as the researcher uses a reflective journal to record decisions made regarding the data, coding, and method. Yilmaz (2013) suggested that researchers use a reflective journal to record participant reactions and accounts of interview setting. Researchers using a reflective journal capture thick descriptions and notes regarding the background of the data (Houghton et al., 2013). In order to ensure transparency, I kept a reflective journal to store participant reactions to the questions and setting. I also included personal thoughts regarding organizational documents and I explained all decisions related to data coding and themes.

Houghton et al. (2013) described best practices researchers adopt to protect participants during and after interviews. Before the interview, researchers must obtain

informed consent. After the interview, researchers should only use the data collected for the purpose of the study, collect only data needed for the study, keep these data secured, and dispose of the data properly (Houghton et al., 2013). Researchers should keep all raw data in a locked safe and all electronic data in password-protected device to restrict access (Houghton et al., 2013). Once I conducted my interviews, I codified the data to ensure confidentiality. I refrained from using any identifying information such as name, location, or organization's name. I used any demographic information collected strictly for the purpose of the study and I did not make this information available to anyone else. I stored all data collected on a flash drive where it will remain for 5 years after the interviews. Once this 5-year period expires, I will shred all hard copies of the data and physically destroy the flash drive containing this study's data.

Data Analysis

Researchers use multiple sources of data to conduct case study research (Graue, 2015). Researchers conducting case study research analyze data using four possible types of triangulation, which are data, investigator, theory, and methodological triangulation (Graue, 2015). Researchers use methodological triangulation when using more than one data collection technique (Carter, Bryant-Lukosius, DiCenso, Blythe, & Neville, 2014). A researcher investigates the phenomenon through multiple perspectives including interview data and document review (Carter et al., 2014). Researchers use triangulation to display the richness and depth of the data (Carter et al., 2014; Fusch & Ness, 2015). I used methodological triangulation in this study to analyze the data collected through interviews and document review, displaying the richness and depth of

the data. Data were compiled and organized, disassembled into fragments, reassembled into sequence of groups, and interpreted for meaning, as recommended by Yin (2018).

In qualitative research, data analysis should transpire concurrently with data collection (Mueller, 2014). Some methods for qualitative data analysis are thematic, content, and discourse analysis (Graue, 2015). Through thematic analysis, the researcher reviews the interview transcripts several times in order to develop a familiarity with the text (Houghton et al., 2013). A researcher often uses CAQDAS to assist with the classification, organization, and analysis of the data (Woods et al., 2015) and to identify themes and the relationships among these themes (Woods et al., 2015).

Once the researcher imports the data into a CAQDAS, the researcher uses meaningful unit analysis to analyze the data. The researcher determines the meaningful units, which can consist of a letter, word, or phrase (Campbell, Quincy, Osserman, & Pederson, 2013; Fusch & Ness, 2015; Percy, Kostere, & Kostere, 2015). The researcher may find this analysis more valuable than a line-by-line word analysis because the researcher has the flexibility to assign the units regardless of length (Campbell et al., 2013). In addition, the researcher assigns labels to meaningful units of a transcript and applies these labels to all transcripts (Percy et al., 2015). The researcher can improve the reliability of the study by creating an audit trail on all transcripts and notes using the *Insert Comment* function in Microsoft Word (Percy et al., 2015) to emphasize each meaningful unit with a verifiable description (Fusch & Ness, 2015). Researchers also use a reflective journal to capture possible themes, thick descriptions, and notes regarding the background of the data (Houghton et al., 2013). I followed the interview protocol (see

Appendix A) to import the interview recordings and transcript notes into the DeDoose CAQDAS. I assigned meaningful units and notated these units with descriptions for the readers. I also kept a reflective journal to enrich my data analysis by capturing thick descriptions and notes.

Organizational documents are a second data source for triangulation in a case study. The researcher can use thematic analysis or content analysis in document review (Carter et al., 2014). Researchers use content analysis to classify codes and identify emerging themes (Doody & Noonan, 2013). In document analysis, the researcher needs to prepare the documents for analysis, organize the documents in a meaningful way, and report the themes uncovered from the organizational documents (Mealer & Jones, 2014). I used content analysis once I obtained relevant organizational documents and scanned the documents into PDF format. I then imported the files into DeDoose for the three phases of preparation, organization, and reporting. During preparation, I familiarized myself with the documents and selected a suitable unit of analysis. I then organized the data by assigning meaningful codes. Finally, I categorized the data.

The researchers should track reflections and considerations while moving between interviews (Doody & Noonan, 2013) to group similar labels together in order to identify the themes from the data (Doody & Noonan, 2013). Researchers use concept and mind mapping as tools to help them analyze and interpret the data collected, including the identification of connections between themes and current literature and the selected conceptual framework (Sotiriadou, Brouweres, & Le, 2014). I took notes during my interviews and tracked my reflections between interviews. I used concept and mind

mapping to analyze and interpret data and to identify connections between emergent themes and current related literature and knowledge conversion theory.

Reliability and Validity

To establish reliability and validity in qualitative studies, researchers use the criteria set by Lincoln and Guba (1985). These criteria include dependability, credibility, transferability, and confirmability, forming the collective definition of trustworthiness (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). Researchers establish the reliability and validity components of a qualitative study by ensuring the trustworthiness of the qualitative study (Cronin, 2014).

Reliability

In qualitative case studies, the researcher is the primary research tool (Houghton et al., 2015). Therefore, to ensure reliability, researchers must use reliable instruments and measurements in order to obtain reliable results (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). Several researchers (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013) suggested using three sources of evidence in case study research. These sources include company documentation, interviews, and observations of participants' nonverbal cues during interviews. A good case study relies on multiple, complementary sources, as opposed to using only a single source thinking that this source is superior to the others (Yin, 2018). Therefore, I used three sources in my study, including semistructured interviews, company documentation, and observations of participants' nonverbal cues during the interviews.

In a qualitative study, dependability signifies the soundness of the research (Noble & Smith, 2015; Yilmaz, 2013; Zohrabi, 2013). Houghton et al. (2015) recommend that a panel of experts review the qualitative study. In addition, the researcher enhances dependability by using the same interview questions for each participant (Noble & Smith, 2015; Yilmaz, 2013; Zohrabi, 2013). To maintain consistency, the researcher should not introduce any new questions into the interviews (Noble & Smith, 2015; Yilmaz, 2013; Zohrabi, 2013). Another method to increase data dependability is *member checking*, which is the process of asking participants to review and verify the researcher's interpretation of participants' responses to reduce any possible errors (Noble & Smith, 2015; Yilmaz, 2013; Zohrabi, 2013). Researchers use member checking to ensure they do not present biases as facts in a qualitative study (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). To increase data dependability in this study, I submitted my study to the Walden University committee members for review. I also used the same interview questions in my semistructured interviews and used member checking to ensure data dependability.

Several researchers (Cronin, 2014; Houghton et al., 2015; Yilmaz, 2013) recommended recording participant interviews as a means to produce reliable transcripts and themes. Researchers record participant interviews to free themselves to listen and reflect upon the interviewees' responses (Cronin, 2014; Houghton et al., 2015; Yilmaz, 2013). In order to reduce bias and produce more reliable results, several researchers (Cronin, 2014; Houghton et al., 2015; Yilmaz, 2013) suggested avoiding deliberating with the participants before the interview about the nature of the study. When I

conducted the interviews in this study, I recorded participant interviews to produce more reliable data and requested that the participants provide detailed answers and elaborated on their responses as a means to reduce my biases. I ensured that my perspective did not influence the participants' responses. I refrained from discussing any specifics regarding the nature of the study with participants and maintained consistency by following the interview protocol, and I did not stray from the predetermined interview questions.

Validity

The research validation framework includes credibility, transferability, and confirmability (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). In case study research, researchers build upon previous studies as a means to validate the data and uncover additional perspectives (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). Through this iterative process, the researcher gains credibility (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). As the primary research instrument, the researcher must provide inclusive and transparent data to promote credibility (Houghton et al., 2015). Researchers must thoroughly read the interview transcripts because a thorough analysis allows the researcher to denote the participants' full perspectives (Yilmaz, 2013). The researcher should use member checking to ensure the interview data is valid (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). In this study, I used member checking followed by data analysis. Through my data analysis, I identified similarities and differences to uncover themes.

Another component of validity is transferability, which is the applicability of the study results to other studies. Communicating demographic details regarding the study

participants in a discernible format can help increase the transferability of the study (Carter et al., 2014). In addition, researchers select appropriate participants to improve the quality of the research (Carter et al., 2014). In this study, I used a semistructured interview format, chose appropriate participants, provided details regarding the demographic information of the participants, analyzed the data extensively, and presented study results in an intuitive format to increase the transferability of this study.

Once the researcher establishes dependability, credibility, and transferability, the researcher should ascertain confirmability (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). Confirmability is the capability of the researcher to validate that the data collected embody the participants' responses without the biases of the researchers (Cronin, 2014; Noble & Smith, 2015; Zohrabi, 2013). I achieved confirmability through meticulous transcription of the participants' responses. I listened carefully to each participant and established themes and connections through the data results, as opposed to through my own biases. I verified my results through current literature to increase the confirmability of the results of my study.

Researchers use methodological triangulation when using more than one data collection technique as a means to improve the validity of a study (Carter et al., 2014). A researcher investigates the phenomenon through the use of multiple data collection sources, including interview and document review data (Carter et al., 2014). Researchers use methodological triangulation to display the richness and depth of the data (Carter et al., 2014; Fusch & Ness, 2015). I used methodological triangulation in this study to analyze the data collected through interviews and document review, displaying the

richness and depth of the data. I used member checking to allow participants to confirm and verify my interpretation of their responses to interview questions, reviewed company documents, and made observations of participants' nonverbal cues during the interviews.

Data saturation is an accepted measure regarding the quality of qualitative research (Yin, 2018). O'Reilly and Parker (2013) argued that researchers ensure data saturation by searching for emerging themes during data analysis, reflecting on the data, and continuing to review the data until no new themes emerge. Data saturation occurs when the discovery of additional information in the study would not produce any new or useful data (Lewis, 2015). I searched for emerging themes during data collection, reflected on the data, and continued to analyze the results until no new data emerged. I reached data saturation with five participants by continuing to ask questions until new data only confirmed existing data.

Transition and Summary

In Section 2, I introduced the project plan and discussed the purpose of the study and the research method and design. I provided details about the participants, population and sampling, and role of the researcher. I discussed ethical implications, reviewed how I collected and analyzed data, and discussed the reliability and validity of this research study.

In Section 3, I provide an overview of the study, present the findings, and consider professional applications. I provide details regarding the study outcome and present implications for social change, recommendations for action, and recommendations for future study. I present my personal reflections and a conclusion.

Section 3: Application to Professional Practice and Implications for Change

In Section 3, I provide an overview of the purpose of the study, state the research question, and present details regarding my findings. Also included in this section are the applications of my research to professional practice, implications for social change, and recommendations for action and further study. Finally, I present my personal reflections and my conclusion.

Overview of Study

The purpose of this qualitative case study was to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. I administered face-to-face interviews with five leaders with at least 7 years of successful experience and knowledge related to KMS. I also collected additional data, which included annual and proxy reports. Three themes emerged from the data analysis. Specifically, a continuous improvement environment facilitated KMS incorporation, supportive leadership facilitated KMS incorporation, and a learning community environment improved KMS incorporation. All three themes included subthemes, which illustrate the intricate nature of the data and the emergent themes.

Presentation of the Findings

The overarching research question for this study was, What strategies do financial service industry leaders use to incorporate a KMS into their organizational strategy effectively? I answered the overarching research question by conducting semistructured interviews with five leaders of four different financial services organizations. Through the coding and triangulation process for data analysis, three themes emerged:

- A continuous improvement environment facilitated KMS incorporation,
- Supportive leadership facilitated KMS incorporation, and
- A learning organization environment improved KMS incorporation.

Theme 1: A Continuous Improvement Environment Facilitated KMS Incorporation

The first theme to emerge from the data was that a continuous improvement environment facilitated KMS incorporation. All five participants expressed the importance of such an environment in the overall KMS implementation. After analyzing the data, I identified two related subthemes associated with a continuous improvement environment: a progressive mindset and work process management.

Progressive mindset. Progressive mindset, as a quality that improved KMS effectiveness, consisted of (a) innovative technology, (b) best practices, and (c) periodic evaluations. C1P2, C3P4, and C4P5 expressed the value in their organizations of innovative and competitive technological advancements. C4P5 explained that in a financial services organization, innovative technology helps financial services organizations remain competitive. In addition, C1P2 expressed the positive reception by the employees to new technology, as the employees understood the value and time-saving the KMS would bring to their role.

C3P4 reflected on building a team with employees who also valued innovative technology because then the "employees are always used to working . . . and always pushing the edge [of innovation]." C4P5 shared that employees contributed to an effective KMS because they understood they "would not be able to meet the technology implementation deadlines without well-documented processes." In addition, Lech (2014)

determined that knowledge transfer and creation were key components in the success of enterprise's system implementation projects. Scholten et al. (2014) ascertained that innovation can increase collaboration and the utilization of the KMS.

My analysis of company documents also supported the importance of innovation and a progressive mindset. A document entitled *Company Profile* emphasized C1P1 and C1P2's dedication to innovation and expansion by highlighting organizational growth and cutting-edge product offerings. A second document entitled *2017 Annual Report* described the measures C3P4 took to ensure that C3P4's organization was equipped to adapt to market trends and customer needs. These measures included new technology and a streamlined organizational structure. Cantor et al. (2014) found that implementing a suitable KMS was one action that organizational leaders take to reduce risks in a shifting market.

Consistency. C1P2, C2P3, C3P4, and C4P5 emphasized the effect that consistency has on the incorporation of a KMS. Specifically, the need for consistent procedures was a motivating factor for using the KMS. There were several examples where a lack of consistency hindered the employees' productivity. C1P2 discussed training new hires and stated that "new employees get conflicting info . . . trying to reconcile some of those [differences between procedures] for someone who's brand new coming in from the outside is difficult." C4P5 found that consistency was important after a merger and stated that "people were eager for some order, so a consistent methodology was welcome after the transition."

Leaders also found that consistency within the KMS had a positive influence on their organizations. C2P3 emphasized that the "adoption of similar tools, or tools that can at least talk to each other, is critical to success." C4P5 shared that the company "has a considerable percentage of employees that work from home . . . it's important that we have a uniform and consistent means for people to access processing procedures." C1P2 and C4P5 also found that distributing work across teams is easier if procedures are stored using a similar methodology. C1P2 and C4P5 used a standard procedural template as a basis for processing notes, keeping the notes updated for client customizations. Tsai (2014) ascertained that a successful KMS would be available for different users across the organization to fit the individual needs while remaining consistent and uniform. Moon and Lee (2015) advocated that consistency within a KMS is an integral component in a continuous improvement environment to maintain a flexible culture. A document from C4P5 entitled *2017 Proxy Statement* included language related to leaders "committed to engaging . . . to promote open and sustained dialogue in a manner consistent with the Company's communications policies and procedures."

Correlation to the literature. The results found in Theme 1 align with the findings of Randall et al. (2014) that incorporating a successful KMS relies on continuous improvement and standardized procedures. In addition, Machado et al. (2014) identified a positive correlation between a successful KMS and a continuous improvement environment. Villasalero (2014) indicated that leaders who promote innovation, unique knowledge creation, and learning are the most likely to support the flow of organizational knowledge. Ahern et al. (2015) found that a continuous improvement environment

fosters knowledge creation and assists employees with expanding and improving existing ideas and procedures.

Correlation to the conceptual framework. Theme 1 relates to Nonaka and Takeuchi's (1995) knowledge conversion theory. The continuous improvement characteristics of Theme 1's progressiveness and consistency correlate to the knowledge conversion concept of an organization as an organic entity in constant motion in which knowledge is a progressive and ever-changing process (Nonaka & Toyama, 2003). Zhao et al. (2013) noted that through knowledge conversion theory, firms promote innovation and dynamic processes to enhance learning. Employees are able to learn new information, eliminate outdated information, and improve existing information. Nonaka and von Krogh (2009) found that when leaders implement knowledge conversion theory, they promote organizational learning and innovation. Knowledge conversion theory is a consistent yet cyclic model to which the organization should adhere. In this way, employees are following a consistent methodology while also continuously testing and reevaluating the process (Nonaka & Takeuchi, 1995).

Theme 2: Supportive Leadership Facilitated KMS Incorporation

The second theme to emerge from the data was that supportive leadership facilitated KMS incorporation. After analyzing the data, I identified two related subthemes associated with leadership support. All five participants expressed the importance of leadership support in the overall KMS implementation. The leadership support theme was comprised of two subthemes, cultural values and a flexible work environment.

Cultural values. The cultural values that contributed to the increase of KMS effectiveness consisted of (a) encouraging participation and engagement, (b) valuing employees, and (c) hiring resources that share the organizational mindset. C1P1, C2P3, and C3P4 expressed the importance of encouraging participation in the KMS. C2P3 stated, "we try to put that into our message and our culture . . . no matter how experienced you are, or how much you know, utilize those standard operating procedures." Similarly, C1P1 also expressed the importance of leaders creating a culture supportive of collaboration. According to C1P1, "some of it has to do with the culture of the company . . . If you work for a company where it's expected that you are a team player and that your success is your coworkers' success, [you can] fix the things that need to be fixed." Matherly and Al Nahyan (2015) found that leaders should foster an organizational culture of trust and openness, provide incentives for knowledge sharing, and develop teams with the appropriate skills and qualifications.

C1P2, C3P4, and C4P5 expressed the value of innovative and competitive technological advancements in their organizations. C4P5 explained that in a financial services organization, leaders use innovative technology to help them remain competitive. In addition, C1P2 expressed employees' positive reception to new technology, as the employees understood the value and time-savings the KMS would bring to their role. C3P4 expressed that "it's about bringing the right system in and then driving that culture down."

C3P4 reflected on building a team with employees valuing innovative technology because the "employees are always used to working . . . and always pushing the edge [of

innovation]." C4P5 shared that employees contributed to an effective KMS because they understood that they "would not be able to meet the technology implementation deadlines without well-documented processes." Lech (2014) determined knowledge transfer and creation are key components in the success of enterprise system implementation projects. Scholten et al. (2014) ascertained that innovation can increase collaboration and promote the use of the KMS.

The analysis of the company documents also supported the importance of innovation and a progressive mindset. A C2P3 document entitled *Company Profile* contained information related to leaders emphasizing the organization's dedication to innovation and expansion by highlighting organizational growth and the cutting-edge product offerings. A second document from C3P4, entitled *2017 Annual Report*, included information related to leaders describing the measures the organization took to ensure it was equipped to adapt to market trends and customer needs. These measures included new technology and a streamlined organizational structure. Cantor et al. (2014) examined the actions organizations take to reduce risks in a shifting market and found that implementing a suitable KMS was one such action.

Flexible work environment. Leadership that supported a flexible work environment found a positive effect on the implementation of the KMS. C3P4 stated, "leading edge teams, they work in an agile environment." C1P1 and C3P4 considered important that leaders structure their teams with flexible and open-to-change employees. C1P1 said leaders should hire employees who "have a good attitude and are willing to learn." Similarly, C3P4 expressed that leaders should hire employees "that were used to

communicating and collaborating, and then you had management that bought into it [flexible environment]." Durmusoglu et al. (2014) found that a supportive, flexible, and rewarding environment positively influences knowledge sharing among employees.

C4P5 discussed the manner in which leaders using a flexible work environment motivate employees to contribute to the KMS. "We give employees flexibility as far as their work arrangements go, so we need structured processing notes and training documents." Similarly, C1P1 discussed the way operating teams share work and clients, "as projects come up, we share the workload . . . we wouldn't be able to operate that way without good notes and specs." Bouncken et al. (2015) found that leaders using a KMS can also increase flexibility and adaptation, which assists organizations with growth and change.

C1P1 also found that a relaxed environment yielded positive results. When discussing work from home arrangements and dress code, C1P1 stated that employees should "be comfortable . . . I think this all leads to a cultural shift of people just concentrating on their jobs rather than worrying about what someone is wearing or what time they arrived in the office." Mojibi et al. (2015) determined that adaptable organizations are open to continuous improvement and knowledge sharing.

Organizational documents also contained details regarding the importance of flexibility. A document that I reviewed in C1P1 and C1P2, entitled *Solving Challenges Together*, contains language stating the importance of building a culture that encourages collaboration and effective management of balancing professional and personal responsibilities. A second document from C2P3 entitled *Company Profile* highlighted

the positive effect flexibility can have on employee collaboration and effectiveness. Lee et al. (2015) found the most influential component to knowledge sharing was organizational culture.

Correlation to the literature. The results found in Theme 2 align with Matherly and Al Nahyan's (2015) study in that the most successful KMS works in conjunction with engaged senior leaders. In addition, Bouncken et al. (2015) ascertained that organizational leaders must be flexible and adaptable in order to expand and compete effectively. Micić (2015) also ascertained that leadership support is critical to the success of a KMS. Another study by Tongo (2015) determined that a common motivational goal is favorable for encouraging collaboration and knowledge sharing.

Correlation to the conceptual framework. Theme 2 relates to Nonaka and Takeuchi's (1995) knowledge conversion theory. Leaders that adopt a framework of knowledge conversion theory promote organizational creativity and collaboration. Nonaka and Toyama (2003) conceptualized organizations as organic entities. In this way, leaders and employees work and collaborate together creating and sharing knowledge. Fisk (2015) stated that knowledge conversion theory contributes to the development of organizational trust. Employees that trust leaders and feel valued are more likely to share their knowledge for the good of the team (Fisk, 2015).

Theme 3: A Learning Organization Environment Improved KMS Incorporation

The third theme that emerged from the data was that a learning organization environment improved KMS incorporation. All five participants expressed the importance of leadership support in the overall KMS implementation. After analyzing

the data, I determined the leadership support theme consisted of two subthemes, which are subject matter experts and training.

Subject matter experts. Leaders relying on subject matter experts to help with the maintenance of the KMS experience positive results. There are subject matter experts for both the KMS and the business that work together to keep the processes current. C2P3 stated, "we rely on our subject matter experts to take the initiative and go out there and update it . . . they have a team that they work with to put it in the right format." C2P3 implemented a dedicated team to maintain and develop all organizational procedures, "a team that sits within our department; they do things from quality, procedures updates, training . . . all of that." Ahern et al. (2015) found that learning organizations expanded and improved upon existing ideas and procedures.

However, all of the other leaders followed a different model. In companies C1P1, C1P2, C2P3, and C4P5, a governance team exists that developed procedural templates and guidance for using, updating, and storing the procedures. Then, it was up to the individual teams to adapt the procedures for their own teams, clients, and customizations. This process often fell to the subject matter expert on the business side of the company. According to C4P5, "it generally falls to the client lead to update a new process . . . they are the ones most familiar with the processing and they would be most aware of the expected results and customizations." Similarly, C3P4 said, "the governance team develops standard templates for common processes . . . it's up to the SMEs [subject matter experts] if they're going to change it or not." Al Saifi (2015) established that business leaders should create guidelines to shape the manner in which employees create

and distribute knowledge. Wilson and Beard (2014) highlighted the importance of this collaboration between teams to facilitate the success of the KMS.

Organizational documents also contained the emphasis the companies place on subject matter experts. A C3P4 document entitled *Leadership & Talent*, contains details that the organization develops talent through collaboration and diversity. The company leaders rely on subject matter experts to become role models, expand on existing ideas, and foster creativity. A C4P5 document entitled, *Tips for Working with your Customer and your Team*, contains language stating that subject matter experts should create and develop learning materials and that leaders find success with KMS when there is collaboration between the business and technology teams. Olander et al. (2015) ascertained that subject matter experts should create standardized procedures.

Training. Several leaders in this study found adequate training to be a vital component in successful KMS implementation. C1P1 stated that training was about engaging employees. C1P1 stated that, ”you’re going to get credit for this, you’re going to make this organization better, you’re going to teach your peers, and you’re going to monitor them.” Firms that reward employees for learning and training have an easier time collecting, codifying, and distributing knowledge (Zhang et al., 2015). According to C1P1, training and sharing knowledge should become part of the organizational culture. C1P1 stated that “everyone has a stake in this . . . you’re expected to do the same work as far as documenting what needs to be documented in order to make team members successful.” An et al. (2014) found that when leaders expect all employees at all levels to

contribute and garner information, leaders build trust and foster communication and participation in the KMS.

The ease of training is a contributing factor in motivating employees to share their knowledge. As new employees are hired, the trainers can direct them to the KMS for helpful information regarding processes and procedures. C4P5 stated that "it's much easier for training, both for the trainer and the trainees, if there is one centralized place to access the info." According to C1P2, if the KMS is not up to date, the existing employees are required to provide additional support and back and forth assistance, which takes up more of their time. C2P3 agreed by saying that "it has made it [training] easier and, in turn, we'll rely on new hires to determine if the procedures are clear." Zhang et al. (2015) found that investing in and supporting organizational learning increased the success of the overall KMS.

In one company document from C2P3, entitled *Your Career Development*, the language used detailed the value the organization places on continuous learning. The organizational leaders provide learning resources, educational reimbursement programs, and experiential learning programs as a means to help employees learn and grow their skills. Another company document from C3P4, entitled *Learning and Development*, described the need for an accessible company learning and training program to assist employees develop their skills. The value realized from the program was that when all employees were given a voice, employees were more likely to participate in the KMS and overall organizational success. An et al. (2014) found that training and learning

programs led to an increased interest and desire to learn, which led to increased innovation.

Correlation to the literature. The results found in Theme 3 align with Wilson and Beard's (2014) study in that organizational learning is an important component for successful KMS implementation. Opengart (2015) found employees within a learning organization foster their ability to learn and adapt, which are essential traits to achieve efficient work results. Pokharel and Choi (2015) determined that the learning organization encourages enthusiasm and participation, which are crucial to the success of the KMS. Ahern et al. (2015) found that leaders that allowed employees to expand and improve upon existing ideas and procedures witnessed increased problem solving and overall process improvements.

Correlation to the conceptual framework. Theme 3 relates to Nonaka and Takeuchi's (1995) knowledge conversion theory. Through knowledge conversion theory, the organization becomes an active contributor to knowledge creation and management (Takeuchi, 1995). Leaders should provide learning opportunities for their employees to develop their own ideas and suggestions, which they will, in turn, share with the organization. This cyclic process of learning and creation is a critical component of knowledge conversion theory (Nonaka & Toyama, 2003). Crane and Bontis (2014) expanded knowledge conversion theory to explore the way tacit and implicit knowledge work together and found that leader-developed learning supported effective KMS implementation. When leaders invest in their employees' learning and provide them with

a voice, employees will have the skills and confidence to contribute to the KMS (Fisk, 2015).

Applications to Professional Practice

In this study, I explored strategies financial services leaders use to incorporate a KMS into the overall organizational strategy. The findings from this study could positively impact leaders by improving the implementation and incorporation of a KMS into their business practices. If used appropriately with an effective strategy, a KMS can provide organizations with a sustainable competitive advantage by improving employees' problem-solving and decision-making activities and creativity (Chang & Lin, 2015). The advantages of a successful KMS include corporate innovation, agility, and employee satisfaction (Singh, 2013). These attributes can strengthen organizational performance and attract and retain talented employees.

Kuran et al. (2016) found that a KMS, when coordinated with organizational strategy, is a source of competitive advantage for an organization. A KMS influences employees to become innovative by increasing trust, productivity, and collaboration (Park & Kim, 2015). The KMS positively influences product development, research and development, and decision-making processes (Park & Kim, 2015). In a competitive global market, leaders using a strong KMS encourage product development, client growth, and profit growth because of the increase in intellectual capital and innovation (Akanbi, 2016).

Implications for Social Change

An effective KMS can minimize organizational risks, which can lead to a positive social change (Lopes, Scavarda, Hofmeister, Thomé, & Vaccaro, 2017). Leaders could use the knowledge accessed through the KMS to monitor potential threats to the organization and control any factors that could negatively affect operations or the community (Singh, 2013). Guo-Ciang (2013) maintained that sharing knowledge and values throughout the supply chain helps identify potential threats, which reduces costly errors. Financial service industry leaders might use this increased revenue to make charitable contributions to the development of the local community.

Machado et al. (2014) identified a correlation between a KMS and lean processing, which reduces organizational waste. In some cases, a team overhauls an entire process and implements a new procedure or a technological solution. Leaders using this new process are able to streamline production, maintain quality, improve customer service, and enhance knowledge management. Providing improved customer service to community members is an implication for positive social change. In addition, leaders use lean processing to reduce environmental waste (Machado et al., 2014), which benefits the local community because its residents could enjoy a cleaner environment.

Recommendations for Action

The purpose of this multiple case study was to explore strategies financial service industry leaders use to incorporate a KMS into their organizational strategy effectively. Based on the results of this study, researchers should consider the strategies of continuous improvement, supportive leadership, and learning organization, which are effective in

gathering and sharing knowledge to facilitate decision-making and business processes (Ahern et al., 2015; Matherly & Al Nahyan, 2015; Nath, 2015; Scholten et al., 2014).

In addition to providing strategies for a KMS implementation, business leaders can garner from the findings of this study the benefits of investing in a KMS and cultivating a supportive organizational culture (Wu & Chen, 2014). Business leaders can expand upon the findings of this study and the 5-step model for organizational knowledge that Nonaka and Takeuchi (1995) explained. This model consists of (a) sharing of individual knowledge, (b) translating individual experiences into concepts, (c) testing validity of the concepts, (d) developing standards, and (e) distributing knowledge throughout the organization (Nonaka & Takeuchi, 1995).

Imran, Ilyas, Aslam, & Fatima (2018) claimed that industry leaders using knowledge conversion theory contribute to organizational creativity, learning, innovation, and change. My findings reinforced the concept of Imran et al.'s and Nonaka and Toyama's (2003) that organizations are organic entities that are constantly in motion. In order for the KMS implementation to be a success, leaders and employees should dynamically interact with each other. Knowledge creation and dissemination is a cyclic process that should continue to evolve over time (Reid, 2014). Business leaders implementing a KMS should foster a supportive environment, learning opportunities, effective measures, and adequate training to reinforce the success of the KMS.

I plan to disseminate the results of this study in academic journals and professional communications. In addition, I will be available to discuss the results in any professional or academic setting, such as conferences or training sessions. Finally, I will

provide a summary of the findings to the study participants. In addition, the findings of this study will be available electronically and can reach a global audience via the internet.

Recommendations for Further Study

Due to the positive impact a KMS has on organizational performance, the results of this study warrant further research. I limited my study to financial services organizations in the northeast United States. Further knowledge could be gathered from a more diverse organizational type or location. In addition, I only interviewed organizational leaders. I recommend that researchers conduct further studies that capture the experiences of the employees. With a larger sample size, the transferability of the results will be increased. In addition, this study was conducted using a qualitative case study, which relied on my interpretive reasoning. Further studies could use different research methods and designs as a way to reinforce the results.

Reflections

Over the last 13 years, I have worked in various business and assumed different system's roles for 3 different financial services organizations. Throughout my career, I often experienced frustrations due to conflicting information or a lack of information. I found that teams that worked on shared processes did not always share information with each other. This problem would often lead to wasted time or errors. This frustration is what inspired me to research KMS, as I wanted to discover if organizations that successfully implemented KMS experienced less errors and more benefits than organizations that did not. Once I began my research, I found numerous studies that validated the theory that successful KMS implementation led to benefits, such as

increased innovation and creativity and decreased rework. In addition, I was limited by time and resources to effectively measure an organization's KMS implementation and its impact on the organizational success.

Therefore, I made the difficult decision to shift the focus of my study, which led to a full rewrite of Section 1. I decided it would be more beneficial to research the strategies organizational leaders used to successfully implement the KMS. Once I was able to identify a gap in the literature, the problem and purpose statements were much easier to identify. I found that, once I centered the study around the research rather than my own experiences, it was much easier to write.

I believe the interviews had a positive impact on the study participants. Although each of the interviewed leaders successfully implemented a KMS, there were still limitations to the process. For example, not every leader implemented a measure to determine the continued benefit of the KMS. The conversations we had during the interview shed some light on certain components of the process leaders could improve upon. In some instances, it had been several years since the leaders implemented the KMS. For these leaders, the interviews were a way to revisit a process that had fallen in priority since the original implementation.

Conclusion

In conclusion, I identified three strategies that leaders used that contributed to the successful implementation of a KMS. Leaders that implemented a continuous improvement environment and promoted a progressive mindset and consistency, supportive leadership that promoted shared cultural values and a flexible work

environment, and leaders that implemented a learning organization environment with subject matter experts and adequate training all facilitated KMS implementation. The study findings supported and expanded the literature review, which included the categories of knowledge conversion theory and related conceptual frameworks, learning organization, leadership and organizational culture, and organizational performance.

For this case study, I interviewed five participants with leadership and successful KMS experience from four financial services organizations in the northeast United States. I interviewed the participants in a face-to-face setting and recorded the interactions. After the interviews, I transcribed the transcripts and interview notes, loaded the raw data into DeDoose, and analyzed the results to identify the patterns and themes.

The overarching research question for this study was: What strategies do financial service industry leaders use to incorporate a KMS into their organizational strategy effectively? In this study, I provide leaders with effective strategies to incorporate their KMS into the overall organizational strategy. Organizational leaders that implement these strategies can increase the organization's knowledge sharing capabilities, potential for innovation, and creative capabilities, which positively contribute to the competitive advantage of the organization.

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Appendix A: Interview Protocol

Financial Service Leaders' Incorporation of Knowledge Management Systems in Overall Organizational Strategy.

The purpose of this qualitative multiple case study is to explore strategies financial service industry leaders employ to incorporate a KMS into their organizational strategy effectively.

Interviewee: _____ Location: _____

Date: _____ Time: _____

Notes:

1. Greet interviewee and introduce yourself.
2. Provide overview of the study and indicate the usefulness of the outcome.
3. Offer to answer any questions that interviewee may have.
4. Remind interviewee about their volunteer efforts to participate in the study.
5. Remind interviewee about recording the interview and start the recording.
6. Start the interview by recording interviewee's pre-assigned coded name, date, time and location.
7. Start asking interview questions. Allow enough time to answer those questions.
8. Listen carefully to interviewee. Ask probing and follow-up questions, if needed.
9. At the end of the interview, thank interviewee for their participation and time.
10. Provide participant your contact information if they have any questions.

Appendix B: Interview Questions

The interview questions designed to assist me in answering the overarching research question for this study are:

1. What knowledge management system did you employ in your organization?
2. If there were multiple knowledge management systems, how do they work together?
3. Which employees in your organization were required to participate in the knowledge management system program?
4. What strategies did you employ to encourage participants to participate in the knowledge management system program?
5. What roadblocks to participation in the knowledge management system did you encounter in your organization?
6. How involved is leadership in the oversight of the knowledge management system?
7. What cultural elements of your organization contributed to the level of success of your knowledge management system?
8. What measures were in place to test the success of the knowledge management system?
9. How structured are the procedures for participating in the knowledge management system?
10. Is there anything that I have not asked you that you think it is important for you to say?