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## TWENTIETH CENTURY MANAGEMENT THEORY IN TODAY'S ORGANIZATIONS – HOW RELEVANT IS A FORTY-YEAR-OLD MODEL IN THE CONTEMPORARY CONTEXT OF A CALL<sup>a</sup> CENTER.

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### ABSTRACT

In the search to find the solution to the 'one best way' to provide a conduit for contact between organizations and their customers, call centers represent a recent incarnation of the principles of scientific management developed in the first decades of the last century.

This paper seeks to apply another iconic legacy of twentieth century management theory, Tuckman's four-stage model of group development devised in 1965, to organizations which didn't exist when the original idea was first postulated.

How relevant are the 'forming', storming', norming, and 'performing' stages of progression to an environment renowned for constant changes to group membership? In his 1977 revision of the four-stage model with Jensen, Tuckman acknowledged the limited capacity of the theory to account for transient participation in groups.

This paper reports the findings of research which provides evidence that Tuckman's model describes accurately the patterns of behaviour demonstrated by groups of newly selected call center workers completing their initial induction training in an Australian, semi-government, call center.

Call centers provide a contemporary context for the application of Taylorist management principles, symbolic of practice more readily associated with the industrial revolution than with 'modern' organizations. Tuckman's 1965 model has a similar resonance for call centers today.

### I. INTRODUCTION

In their Taylorian quest to provide the 'one best way' to deliver contact with 'customers' call centers have acquired a reputation as highly structured, stressful and emotionally demanding workplaces. (Barrell 2000; Knights & McCabe 1998; Mulholland 2002; Peauccelle 2000; Richardson 2003; Scott 2002; Taylor et al. 2002) Others are more vociferous in their views variously claiming that some call centers are toxic (Kjellerup 1999), sweatshops (McDowall 2003), equal to the worst excesses of Ford's production line (Ferne & Metcalf 1998), and treat workers as galley slaves (Kjellerup 2005). On the other hand, call centers are also recognised for providing employment opportunities, offering career options (Arzbacher, Holtgrewe & Kerst 2000), developing employee commitment (Hutchinson 2001; Kinnie, Hutchinson & Purcell 2000), and coaching and supporting staff (Ballard 2003; Bryant 2002; McLean 2001; Schneider 2003).

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While Frederick Taylor originally devised the principles of scientific management during the first decades of the twentieth century (Keeling 2000), links endure with contemporary organizations by virtue of the work of Fritz Erlang, who developed a theorem of queues, derivatives of which are employed by computer systems to allocate callers to operators in call centers, (Read 2000; Wallace & Hetherington 2003).

Tuckman's review of the literature on group development extending back to 1945, was published in 1965. The article proposed a four stage developmental sequence for small groups and identified two 'realms' of group behaviour, focused on task accomplishment and the maintenance of interpersonal relationships (Tuckman 1965). Testimony to the model's enduring appeal is wide ranging recognition accorded to the rhyming *forming*, *storming*, *norming* and *performing* stages in a range of management, communication and organizational behaviour texts (Chaousis 1995; Cherrington 1994; Dwyer 2002; Forsyth 1990; Mallott 2001; Napier & Gershenfeld 1999; Robbins et al. 2000; Robbins et al. 2001; Samson & Daft 2003; Schermerhorn 2002; Tindale et al. 1998; Welbourne 2001).

The aim of this paper is to determine whether Tuckman's iconic model of group development retains relevance in the contemporary organizational context of a call center.

## II. REVIEW OF THE PROBLEM

Although many call centers claim to be organised on team-based structures (Bain 2002; Baldry, Bain & Taylor 1998; Callaghan 2002) the extent to which groups actually function as teams or behave more like collections of members focused on, and appraised by, the achievement of specified individual performance goals, has received little attention from researchers (Hingst 2006). Tuckman's model of group development was revised in 1977 as a result of a collaboration with Jensen to include a fifth, *adjourning*, stage (Tuckman & Jensen 1977). The additional stage emerged in articles written during the intervening years from 1965 as a feature of group dynamics not previously considered but relevant to groups experiencing a finite existence (Tuckman & Jensen 1977).

This paper focuses primarily on the earlier incarnation of Tuckman's model. The word 'team' is notably absent from either version of Tuckman's work. He preferred instead to concentrate on the study of groups. Most definitions of the terms agree that all teams are groups but not all groups are teams (Forsyth 1990; Napier & Gershenfeld 1999; Robbins et al. 2001; Tindale et al. 1998). It seems safe then to accept that, regardless of whether teams actually exist in call centers or not, the structures which do, fall within the compass of the meaning of 'group' as Tuckman uses it. Tuckman's model, particularly the five stage variant, has a resonance with teams formed for the purpose of completing a project (McGrew, Bilotta & Deeney 1999), and has been recently employed as a framework for the analysis of group development of virtual project teams (Furst et al. 2004). Both these cases illustrate that Tuckman's model is a relevant framework for analysing and understanding the behaviour of groups working with technology in ways never envisaged in 1965.

Elsewhere, it has been suggested that, with suitable modification, Tuckman's model could be adapted to describe patterns of group evolution where membership of the teams were subject to change over time in a call center environment (Hingst 2006). In this work, the dynamics of a group with relatively stable membership is traced to determine whether the *forming*, *storming*, *norming* and *performing* stages emerge as a group of call center operators progress through their initial, six week period of structured induction training.

## III. SUMMARY OF RESEARCH PROCEDURES

The subject organization of this case study, hereinafter referred to as Ozcallcenter, is a predominately inbound, 180 seat, quasi-government call center operating as part of an Australia-wide network located in a regional city. Members were selected for participation in a schedule of individual extended interviews based on their experience as a team of call center operators, recruited in early 2005, as a cohort by Ozcallcenter for initial employment training. The team consisted of ten trainee operators and their two trainers, (one of whom assumed the role of team leader on completion of the training period while the other returned to duties elsewhere within the center). Four experienced call center operators joined the team when it was deployed on the 'floor' of the call center but are not considered to be team members for the purpose of this study due to their limited contact

with trainees during their induction period. One of the original recruits the resigned from Ozcallcenter after completion of training but prior to meeting probation requirements. Participation in the interviews was voluntary and six of the team members originally recruited in 2005 and their trainers were interviewed. Interviewees will be referred to by a coded, alpha/numeric descriptor in the remainder of the paper so that the identity of individual participants can be preserved.

#### IV. MAJOR FINDINGS

Prior to the recruitment of the subject group of this case study in 2005, Ozcallcenter followed standard practice of the wider network by deploying newly trained operators within existing teams to supplement their strength, diminished through attrition caused by transfer, leave, retirement, resignation and promotion. Normally, one or two block recruitment activities occur each year. The available training facilities limit each intake of newly selected recruits to ten per recruiting round. In this instance, Ozcallcenter management decided to depart from usual policy and deploy the team as an integrated unit on completion of their training. The primary motivation for this move was the alignment of the team's training with newly formulated, higher standards of task performance, which were to be integrated on a broader scale within the call center, and eventually, the entire network.

This investigation also provided the opportunity to explore anecdotal evidence, collected in earlier round of research conducted in the same organization, with operators who had trained as a team and then dispersed amongst existing teams. These interviewees claimed that bonds formed during their training experience were stronger and more enduring than those formed with members of the existing teams to which they were subsequently allocated. (Hingst 2006)

Data gathered at interview with the 2005 recruits and their team leaders confirm the significance of the shared experience of group development. Interviewee R03 commented that:

*"...we started together (we were) scared newbies, you've got to cling together... we learnt everything together, we've gone through every stage together."*

The team leader went further by suggesting that:

*"There's definitely a unique bond between people who trained together as opposed to that you come across in other teams."*

Both groups of interviewees experienced a training process which, while designed to prepare them for the task they would be required to perform, also included tactics intended to assist trainees to navigate through the interpersonal stages of group development however, the latter group, (the subjects of this research), were trained to a higher performance standard than their predecessors. Tuckman's 1965 four-stage model is tested here against the data collected at interview to determine its validity as a descriptor of group development in a call center context subject to relative stability of group membership.

#### V. RELEVANCE OF MODEL

In this section Tuckman's four stages of sequential small group development will be explained and related to interview data. In addition, Tuckman's interpersonal relationship and task realms will be related to the group's experience during training. Trainees recruited to the organization were selected by a process designed to ensure that candidates are psychologically suited to the structured nature of the work and the type of contact they will be expected to have with customers. Reflecting on the process of selection, R04 commented upon the choice of candidates suited to the work and environment. *"The interview stage you go through to be employed here (ensures) everyone is values are generally not that much different.."* Ozcallcenter also attracts a number of applicants from experienced call center workers, some of whom were employed elsewhere in the city within the call center industry.

## VI. FORMING

The first significant stage of Tuckman's model is *forming* which Tuckman describes in the following terms:

'Groups initially concern themselves with orientation, accomplished primarily through testing. Such testing serves to identify the boundaries of both interpersonal and task behaviors. Coincident with testing in the interpersonal realm is the establishment of dependency relationships with leaders, other group members, or preexisting standards. It may be said that orientation, testing and dependence constitute the group process of *forming*.' (Tuckman 1965, p. 396)

Data collected from team members indicated the presence of *forming* stage behaviours during the initial period of orientation and induction training. According to R07 these behaviours became noticeable from an early stage. "*Forming (took place) right from day one.*"

The content of the program addresses many of the needs members have during the *forming* stage for information about their new role, the training through which they will progress, performance expectations, leadership functions, team structures, details of the wider organization and the specific work environment in which they will be placed on completion of their training. Trainers integrated specific 'disclosure' activities into the program which served to introduce members to each other, their team leader and trainer. R04 provides examples of these activities.

*"We wrote up sheets of our dislikes and likes to give everyone an overview of what our personality was. We wrote them out on sheets (of paper) placed on the wall above where we sat so that whenever you walked in you could see the type of people you were working with."*

Once the group has acquired knowledge of the task at hand and of each other, it progresses to what can be the most challenging stage of development, *storming*.

## VII. STORMING

The *storming* stage of Tuckman's model is considered a potential source of destructive conflict which can disrupt, or even jeopardise, the ability of a group to successfully advance through the subsequent stages of development to become a productive unit. (Borchers 2002; Chaousis 1995; Hare 1992; Robbins et al. 2001)

'The second point in the sequence is characterized by conflict and polarization around interpersonal issues, with concomitant emotional responding in the task sphere. These behaviors serve as resistance to group influence and task requirements may be labeled as *storming*.' (Tuckman 1965, p. 396)

A significant influence upon group behaviour was a pervasive code of conduct, extant within the center and throughout Ozcallcenter's parent organization, which played a significant part in limiting the destructive impact of conflict that arose during the *storming* stage of the training team's development. It enabled trainers to draw participants' attention to a benchmark standard of acceptable behaviour when conflict emerged and prevented the destructive repercussions from permeating the broader group. To a lesser extent of significance, it also provided tools with which the conflict could be more constructively resolved.

The training team did not escape the experience of conflict entirely. It was noted by R05 that:

*"... there was friction within the training group at times and it was from comments that someone would make... and someone else wouldn't appreciate it but with the (code of conduct) they were pulled into line and told it wasn't appropriate... it lessened the amount of friction that could have happened if you had have been in a more open and free environment."*

Ultimately, the most telling affect that the code of conduct had was not the elimination of conflict, but the provision of a framework for the constructive resolution of it. R01 summarises the affect of the code of conduct on the *storming* stage experienced by the group with the comment: "*I think that was probably a much shorter process for those people than a group of new people coming in.*"

When conflict is unresolved, a risk exists that the group will continue to revisit this stage, regressing in its development from the subsequent stage of *norming*, or even *performing* (Mallott 2001). The established code of conduct largely prevented this from occurring at Ozcallcenter.

### VIII. NORMING

The third stage identified by Tuckman is *norming*.

'Resistance is overcome in the third stage in which ingroup feeling and cohesiveness develop, new standards evolve, and new roles are adopted. In the task realm, intimate, personal opinions are expressed. Thus, we have the stage of *norming*.' (Tuckman 1965, p. 396)

Ozcallcenter has a set of external norms which guide the behaviour of all members of the organization. The Taylorist principles of scientific management embraced within the call center result in a highly structured and monitored work environment. Team members are regularly coached by their team leaders, particularly on ways to improve their task performance, but also on their relationship to others within the team and, to a lesser extent, the wider Ozcallcenter community. From the commencement of their training, this team was aware that they would be expected to achieve higher standards of job performance than those that prevailed throughout the center at the time.

One of the trainers expressed reservations about the difficulty the group might experience in achievement of the prescribed performance standards.

*"These guys were the first recruits we've had since they brought in a real expectation of the standard they would be at the end of their probation period to pass probation. We've never had that before. No other team leader would have wanted my job because we all thought that the targets were very difficult to achieve. That wasn't my job to tell them I thought it was going to be hard – my job was to instil in them that these were achievable targets, that this is the expectation and that if you want a job at the end of six months you need to meet these targets. We'll give you all the assistance we can and we'll support you but... So my job really was very much that we needed them to bond but we also needed them to be really aware of the task expectation."*

In many respects, the group had little discretion in establishing '... norms governing both work processes and communication content. Agreements on timetables and individual areas of responsibility...' (Furst et al. 2004, p. 9), which guide teams in other organizations. Ozcallcenter's externally imposed norms were internalised by team members and focused their attention on preparation for their deployment to the floor of the call center. Prior to this though, R01 observed that: "... the group had worked out what was acceptable within the team."

### IX. PERFORMING

At this stage of their training, the group had acquired the skills necessary to cultivate meaningful working relationships and developed their task competence to the point where they were periodically exposed to work on the call center floor. Here they proved that they could perform the tasks required of their job to the required standard. Tuckman describes this stage in the following terms.

'Finally, the group attains the fourth and final stage in which interpersonal structure becomes the tool of task activities. Roles become flexible and functional, and group energy is channelled into the task. Structural issues have been resolved, and structure can now become supportive of task performance. This stage can be labeled as *performing*.' (Tuckman 1965, p. 396)

This is the stage of development at which a group attains the characteristics of a functioning team, although Tuckman never used the word 'team' in conjunction with his model. Expectation for this team were divided between: management, who expected that the outcome of their training would be the achievement of increased performance standards; the trainees and trainers, who expected that the standards would be achieved; and, the remaining members of Ozcallcenter, many of whom felt threatened and anxious at the personal prospect of themselves having to meet the new levels of performance.

Team member R08 took pride in the achievement of the required performance standards.

*“Yes, we’re amongst the top in the center but I think that’s primarily because we were taught to a certain standard. Most of us came from private enterprise where it’s a lot tougher and expectations are really high. People here have been here for so long and the standards have gradually (increased) again and again and some people have struggled with that change. When we came in we learnt right from the start these are the expectations, that is what you’ve got to achieve. We didn’t know any different. We’ve just learnt right from the start this is the expectation; this is where we’ve got to be; we’ve all achieved it, we’ve all maintained it.”*

Although all ten recruits completed the training period and were employed on the floor of the call center, one member resigned before their probationary period was due for review. The performance level of the team generally exceeded that achieved by other, more longstanding teams within Ozcallcenter. Ample evidence was provided to indicate that during the training period, where the group were able to interact with each other they formed some interdependence of relationships in the training environment. Groups meet on a weekly basis to problem solve, participate in training sessions and discuss topics of professional interest.

The success experienced by this group has led Ozcallcenter to review the way it employs operators on completion of their initial training. During 2006, at least one other group has been trained to the new standards and employed as a team on the call center floor.

## **X. TASK AND INTERPERSONAL RELATIONSHIP REALMS**

An often overlooked contribution made by Tuckman’s sequential model of small group development was the articulation of the task and relationship dimensions, or ‘realms’, of group activity (Tuckman 1965).

*‘Within the studies reviewed, an attempt will be made to distinguish between *interpersonal* stages of group development and *task* behaviors exhibited in the group. The contention is that any group, regardless of setting, must address itself to the successful completion of a task. At the same time, and often through the same behaviors, group members will be relating to one another interpersonally. The pattern of *interpersonal relationships* is referred to as *group structure* and is interpreted as the interpersonal configuration and interpersonal behaviors of the group at a point in time, that is, the way the members act and relate to one another as persons. The content of interaction as related to the task at hand is referred to as *task activity*.’ (Tuckman 1965, p. 385)*

The preceding section provided evidence to support the contention that the training team was regarded as high performing when measured against organizational standards. Team members attributed their success to interpersonal bonds, derived from shared experience, which enabled them to meet and exceed the challenging goals set for them. Interviewee R02 noted the duality of focus between building relationships with others so that the group’s tasks could be better accomplished and the need for task completion.

*“We had to because we still had a job to get done. Where I suppose we spent most of our time developing the interpersonal relationships, we still had to get the training done so that was our focus as well.”*

Effective maintenance of interpersonal relationships also affects the leadership function. The team leader identified the vital role that interpersonal relationships play in enabling trust to be built between members of the team.

*“If you don’t have that interpersonal relationship and understanding of what’s going on with the person, and them having the trust to talk to you when they feel that they need something, their performance suffers.”*

The structured training environment, and team-building activities, had an influence on the strength of interpersonal bonds formed between group members. On the call center floor, while the relationships continued to exist, the individual nature of operators’ work, and restrictions imposed by staggered rostered break times, suggests that fewer opportunities existed on a day-to-day basis for interaction with other members of the team.

The anecdotal evidence gathered in the earlier round of interviews with Ozcallcenter staff, on the relationship they developed with members of teams they joined subsequent to the completion of their training, would therefore also seem to have some substance.

## XI. CONCLUSION

Ozcallcenter is far from the toxic sweatshop some call centers are claimed to be. In fact it enjoys an unofficial reputation as a preferred employer amongst workers in the call center industry in the regional city where it is located. However, Taylorian overtones abound. The environment is highly structured and monitored. Attendance data can be collected to detect deviations from program in sub-second increments. Performance statistics generated by computer programs based on Erlang's queuing theorem, form the basis for individual coaching sessions between individuals and team leaders.

Rather than being exclusively focused on achievement of acceptable performance standards, Ozcallcenter recognises the role that interpersonal relationships perform in effective service delivery. It invests time and effort in developing this aspect of staff from through the process of recruitment, selection of staff and induction into the organization. During their initial employment skills training, recruits are formed into a training group and exposed to tactics designed to develop group cohesiveness while instilling the necessary knowledge and attributes necessary to perform their role as call center operators.

Tested against this background, Tuckman's four-stage sequential model of small group development was found to be a relevant framework for the description and understanding of both the stages of evolution and to the identification of the task and interpersonal relationship realms of a group of newly recruited call center operators participating in a six week training program.

## XII. RECOMMENDATIONS FOR FURTHER RESEARCH

Further investigation into call center teams seems necessary in order to establish whether in fact teams exist solely as structural elements of call center organizations or as groups that have achieved the *performing* stage of Tuckman's model and have thus evolved to achieve the status of teams in a meaningful sense. The style of leadership and role of team leaders as coaches within call centers also invites further study.

Due to the small size of the interview cohort, it would be worthwhile to repeat this study with subsequent training teams and to extend the study beyond Ozcallcenter.

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