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**APPRECIATIVE MERGER AND ACQUISITION TEAM COACHING  
PROGRAMME TO FACILITATE MANAGERS' MENTAL HEALTH IN A  
CROSS-CULTURAL CONTEXT**

By

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# Dedication

I dedicate this thesis to my husband, Hendrik. Thank you for your trust, giving me the freedom to make mistakes and caring for our sons. I have been liberated by our relationship.



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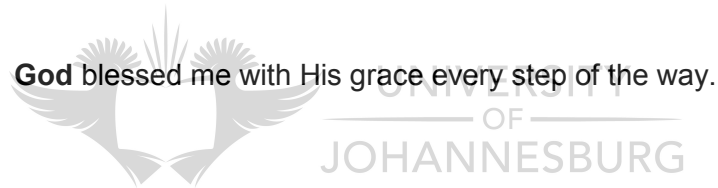
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# Summary

*“Words are spiritual...they have ways of resurfacing in power.”*

*(“Lukwethi” team member)*

One overarching **research aim** guided me in this research, namely to generate a worthy Appreciative Merger & Acquisition (M&A) team coaching programme to facilitate managers’ mental health in the context of a cross-cultural M&A. The **context** represented a hotel in Swaziland, which was situated in a Southern African hospitality environment. A variety of stories reflecting the **paradoxical, alienating nature of M&As** impelled me to enter the research context. At the same time, research and literature confirmed a preference for organisational change strategies that depart from a **deficit orientation**. These change strategies presuppose that something is broken in the organisational context, which needs to be repaired. Inherent power-driven organisational change processes are often employed as a strategy to try and repair the identified organisational brokenness.

It was, therefore, from a position of curiosity regarding the **cross-cultural M&A experiences of managers** in the particular hospitality environment, as well as interest in **positive organisational change initiatives**, that I have gone on this journey. **Positive organisational change initiatives** celebrate the life-giving stories of organisational life. It departs from the assumption that something in an organisation does work. On entry, I hoped that the context would lend itself to implementing an existing M&A team coaching programme. Additionally, that the stakeholders involved would allow the transfer of such a programme in order to establish its worth while contributing to the advancement of theory in the field of business coaching.

**Two central research questions** were asked. These questions related to the existence of an M&A team coaching programme that lacked scientific credibility at the time, as well as literature that confirmed the detrimental influence of mismanaged cross-cultural M&A implementation processes driven from a deficit orientation on the mental health of managers.

- Can an M&A team coaching programme to facilitate managers’ mental health for sustained performance be applied to a cross-cultural M&A in a Southern African hospitality environment?
- If the programme is applicable, how can it be refined, implemented and valued as a foundation to generate a worthy Appreciative M&A team coaching programme to facilitate managers’ mental health for sustained performance in a Southern African hospitality environment?

To achieve the **aim of the research**, namely to generate a worthy Appreciative M&A team coaching programme to facilitate managers' mental health in the context of a cross-cultural M&A, the research was conducted in **three phases** with specific objectives. In **Phase one** I conducted a **situational analysis** to explore and describe managers' experiences of a cross-cultural M&A, as well as their recommendations for improved M&A implementation practices to establish the applicability of the existing M&A team coaching programme in the Southern African hospitality environment. The focus of attention of **Phase two** was to describe a **refined conceptual framework** of an Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance in the context, incorporating **programme implementation guidelines** based on the findings of Phase one, followed by programme implementation. Thereafter, managers' experiences of programme implementation were explored and described to value the worth of the programme and to ensure continued programme refinement. **Phase three** focused on the **establishment of programme worth** from an expert stakeholder group and auto-ethnographic perspective, as well as on generating **recommendations** for further programme refinement, ultimately to improve future programme applicability in a Southern African hospitality environment.

A **qualitative, evaluative research design, theory generating in nature**, complemented by an **auto-ethnographic strategy**, was followed to realise the objectives integral to the research aim. **Multiple data collection methods** were used in each of the three phases. These methods included naïve sketches, focus groups, field notes, descriptive feedback sheets, coaching tools and techniques, document reviews and qualitative individual interviews. Tesch's descriptive method of open coding was used to **analyse** the data. Literature was used in a focused fashion to recontextualise new findings and to support evidence.

The findings of the **situational analysis** indicated that the programme was applicable to the context. Managers described the cross-cultural M&A as a paradoxical organisational change process, starting in the pre-M&A phase and extending into the M&A implementation phase, creating "*mounting pressures*". On the one hand, **problem-saturated stories** emerged that threatened managers' mental health. On the other hand, **marginalised stories** of "*hope and promise*" surfaced. **Recommendations** for improved M&A implementation practices signified a way to harmonise the problem-saturated stories and the stories of "*hope and promise*", thus facilitating mental health.

The findings of the **second phase** of the research reflected the **Appreciative M&A team coaching programme as worthy** in the eyes of the managers. The programme evidently



facilitated managers' mental health for sustained performance in an organisational context that was alive with environmental demands.

**Final descriptions of programme worth** made by an external stakeholder group in **Phase three**, complemented by an auto-ethnographic programme valuation, confirmed programme worth. The **unique contribution** of the research is related to the addition of a **worthy Appreciative M&A team coaching programme** to the knowledge field of business coaching, confirmed by the following declaration of an expert stakeholder: *“The candidate had the insight to recognize the value of appreciative inquiry for enhancing coaching long before Orem, Binkert and Clancy (2007) had their book on appreciative coaching published. Moreover, she realised the value of appreciative inquiry’s principles as the foundation for implementing the programme. It seems that these principles guided the candidate/coach to introduce a programme rich in methods and techniques that collectively opened up possibilities for positive change.”*



# Opsomming

*“Words are spiritual ... they have ways of resurfacing in power.”*

*(“Lukwethi” spanlid)*

Een oorhoofse **navorsingsdoelwit** het my tydens hierdie navorsing gelei, naamlik om 'n agtenswaardige Waarderende Samesmelting en Oorname (S&O) spanafrigtingsprogram te ontwikkel ten einde die geestesgesondheid van bestuurders in 'n kruis-kulturele S&O konteks te fasiliteer. Die **konteks** het 'n hotel in Swaziland, wat in 'n Suidelike Afrikaanse gasvryheidsbedryfomgewing geleë is, verteenwoordig. 'n Verskeidenheid verhale wat die **paradoksale, vervreemdingsaard van S&Os** weerspieël, het my genoodsaak om die navorsingskonteks te betree. Terselfdertyd het navorsing en literatuur 'n voorkeur vir organisatoriese veranderingstrategieë bevestig wat vertrek van 'n **onvolkomenheids-oriëntering**. Hierdie veranderingstrategieë voorveronderstel dat iets in die organisatoriese konteks gebroke is en dat dit reggemaak moet word. Inherente magsgedrewe organisatoriese veranderingsprosesse word dikwels as 'n strategie gebruik in 'n poging om die geïdentifiseerde organisatoriese gebrokenheid te herstel.

Ek het dus hierdie reis aangepak uit nuuskierigheid oor bestuurders se **kruis-kulturele S&O ervarings** in die spesifieke gasvryheidsbedryf, asook uit belangstelling in **positiewe organisatoriese veranderingsinisiatiewe**. Hierdie **veranderingsinisiatiewe** vier die lewegewende verhale van organisatoriese bestaan. Die vertrekpunt daarvan is die veronderstelling dat iets in 'n organisasie werk. Met my intrede tot die navorsing het ek gehoop dat die konteks vatbaar sou wees vir die implementering van 'n bestaande S&O spanafrigtingsprogram. Bykomend, dat die betrokke aandeelhouders die oordrag van so 'n program sou toelaat ten einde die agtenswaardigheid daarvan te bepaal en 'n bydrae sou maak in die vooruitgang van teorie in die besigheidsafrigtingveld.

**Twee sentrale navorsingvrae** is gevra, verwant aan die bestaan van 'n S&O spanafrigtingsprogram wat daardie tyd aan wetenskaplike geloofwaardigheid ontbreek het, sowel as aan bevestigende literatuur betreffende die nadelige invloed van wanbestuurde kruis-kulturele S&O implementeringsprosesse, gedrewe vanuit 'n onvolkomenheidsoriëntering, op die geestesgesondheid van bestuurders.

- Kan 'n S&O spanafrigtingsprogram wat die geestesgesondheid van bestuurders fasiliteer, ten einde volgehoue werkverrigting te bewerkstellig, aangewend word in 'n kruis-kulturele S&O in 'n Suidelike Afrikaanse gasvryheidsbedryfomgewing?

- Indien die program aanwendbaar is, hoe kan dit verfyn, geïmplementeer en geëvalueer word as grondslag om 'n agtenswaardige Waarderende S&O spanafrigtingsprogram te ontwikkel wat bestuurders se geestesgesondheid fasiliteer, ten einde volgehoue werkverrigting te bewerkstellig, in 'n Suidelike Afrikaanse gasvryheidsbedryfomgewing?

Om die **doel van die navorsing**, naamlik om 'n agtenswaardige Waarderende S&O spanafrigtingsprogram te ontwikkel ten einde die geestesgesondheid van bestuurders in 'n kruis-kulturele S&O konteks te fasiliteer, is die navorsing in **drie fases**, met spesifieke doelwitte, uitgevoer. In **Fase een** het ek 'n **situasionele analise** gedoen om bestuurders se ervarings van 'n kruis-kulturele S&O, sowel as hul aanbevelings ten opsigte van verbeterde S&O implementeringspraktyke, te ondersoek en te beskryf, ten einde die aanwendbaarheid van die bestaande S&O spanafrigtingsprogram op die Suidelike Afrikaanse gasvryheidsbedryf te bepaal. Die fokuspunt van **Fase twee** was om 'n **verfynde konseptuele raamwerk** van 'n agtenswaardige Waarderende S&O spanafrigtingsprogram wat bestuurders se geestesgesondheid fasiliteer, ten einde volgehoue werkverrigting in die konteks te bewerkstellig, te beskryf. Hierdie fase het die insluiting van **program-implementeringsriglyne**, wat op die bevindings van Fase een gebaseer is, behels, gevolg deur programimplementering. Daarna is bestuurders se ervarings van programimplementering ondersoek en beskryf om die waarde van die program te bepaal en om voortdurende programverfyning te verseker. **Fase drie** het op die **bepaling van programwaarde** vanuit die perspektief van 'n spesialis aandeelhouersgroep en outo-etnografie gefokus, asook op die ontwikkeling van **aanbevelings** vir verdere programverfyning, om uiteindelik die toekomstige programaanwendbaarheid in 'n Suidelike Afrikaanse gasvryheidsbedryf te verbeter.

'n **Kwalitatiewe, evaluerende navorsingsontwerp, teoriegenererend in aard**, aangevul deur 'n outo-etnografiese strategie, is gevolg om die doelwitte integraal aan die navorsingsdoelwit te verwerklik. **Veelvoudige data-insamelingsmetodes** is gebruik in elkeen van die drie fases, wat naïewe sketse, fokusgroepe, veldnotas, beskrywende terugvoerblaaië, afrigtingstegnieke en –gereedskap, dokumentbeoordelings en kwalitatiewe individuele onderhoude ingesluit het. Data is **geanaliseer** deur Tesch se beskrywende metode van oopkodering te gebruik. Literatuur is op 'n gefokusde manier gebruik om nuwe bevindings te kontekstualiseer en om die bewyse te ondersteun.

Die bevindings van die **situasionele analise** het aangedui dat die program aanwendbaar was in die konteks. Bestuurders het die kruis-kulturele S&O beskryf as 'n paradoksale organisatoriese veranderingsproses, wat in die pre-S&O fase begin en na die S&O

implementeringsfase uitbrei, en “*stygende druk*” veroorsaak. Aan die een kant het **probleemdeurdrenkte** verhale, wat bestuurders se geestesgesondheid bedreig het, na vore gekom. Aan die ander kant het gemarginaliseerde verhale van “*hoop en belofte*” na vore gekom. **Aanbevelings** vir verbeterde S&O implementeringsmetodes het ’n manier aangedui om die probleemdeurdrenkte verhale en die verhale van “*hoop en belofte*” te harmoniseer, en op dié manier geestesgesondheid te fasiliteer.

Die bevindings van die tweede fase van die navorsing het bewys dat die bestuurders die **Waarderende S&O spanafrigtingsprogram** as agtenswaardig ag. Die program het daarin geslaag om die bestuurders se geestesgesondheid te fasiliteer ten einde volgehoue werkverrigting in ’n organisatoriese konteks, wat wemel van omgewingsvereistes, te bewerkstellig.

**Beslissende beskrywings ten opsigte van die agtenswaardigheid van die program**, wat deur ’n eksterne aandeelhoudersgroep in **fase drie** gemaak is, aangevul deur ’n outo-etnografiese programvaluering, het die waarde van die program bevestig. Die **unieke bydrae** van die navorsing is verwant aan die toevoeging van ’n agtenswaardige **Waarderende S&O spanafrigtingsprogram** tot die kennisveld van besigheidsafrigting, bevestig deur die volgende verklaring van ’n eksterne spesialis aandeelhouer: “*Die kandidaat het die insig gehad om die waarde van ’n waarderende ondersoek om afrigting te verbeter besef, lank voor Orem, Binkert and Clancy (2007) hul boek oor waarderende afrigting gepubliseer het. Verder het sy die waarde van waarderende ondersoekbeginsels as basis vir programimplementering besef. Dit blyk dat hierdie beginsels die kandidaat/afrigter gelei het om ’n program, ryk aan metodes en tegnieke, voor te stel wat kollektief moontlikhede vir positiewe verandering geskep het.*”

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## **Chapter 7**

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# Chapter 1

## RATIONALE AND OVERVIEW OF THE RESEARCH

*"I've looked at life from both sides now. From win and lose, and still somehow, it's life's illusions I recall. I really don't know life at all."*

(Joni Mitchell in Demartini, 2002:65)

### 1.1 INTRODUCTION

Merger and Acquisition (M&A) activities are a common organisational change phenomenon in the global business arena. The media regularly reports on companies that face M&A deals. These companies have to strategise creatively around procedures and processes shaped by M&A activity. Investors do not want to suffer economic losses in a context where the dismal track record of M&As is well known (Beer & Nohria, 2000:133). Neglect of the human factor becomes a reality in M&A contexts where the focus is primarily on securing investment capital (Visagie, 2002:89).

Operational or middle managers are severely influenced by the competing forces between top management's financial driven M&A intent and reporting colleagues' quest for organisational security. Hubbard (1999:18) is of the opinion that middle managers act as a buffer between top management and reporting colleagues in these contexts. He adds that managers' engagement in M&As can be compared to the most stressful events in a person's life such as divorce or separation, death of a loved one, moving house and job loss. The difference between M&A change and other organisational changes are embedded in the complexity of the situation. Organisational change usually involves modifications to existing structures and processes, whereas M&A change involves being confronted with a new employer, procedures, cultures, leaders, management styles and no underlying basis for trust (Hubbard, 1999:18, 27).

Van der Merwe (2002:1) describes how the daily stresses in times of profound change are internalised where it "accumulates, stews and erupts in destructive volcanoes of physical disease". These external organisational demands additionally pose a threat to managers' mental health, ultimately reflected in impaired organisational performance.

The outcome of this research was the generation of a worthy Appreciative M&A team coaching programme that can be used as a strategic intervention to facilitate managers' mental health for

sustained performance. It was an extension and further expansion of an M&A team coaching programme that I described as part of my master's study (Visagie, 2002). Emphasis on mental health facilitation differentiates this research from others in the field of business sciences. Chapter one provides an overview of the research process that was followed to accomplish the research outcome.

## **1.2 BACKGROUND AND RATIONALE**

Across the globe the business landscape reflects constant changes. These changes do not take place in a vacuum. It is related to internal ongoing organisational change in organisations, such as recruitment of new employees, the emergence of new positions and roles and the continuous expansion in work procedures and processes (Grove, 2004:30). External organisational change is intrinsically linked to the globalisation of the economy. Companies must relentlessly find ways to improve their competitiveness and this leads to changes in organisational processes, procedures and structures (Grove, 2004:31/32).

Socio-political change worldwide also impacts on the stability of the economy and dictates changes in operational policies and procedures. Kotter and Schlesinger (2008:130) point out that managers must increasingly deal with new government regulations, new products, growth, increased competition, technological development and a forever changing workforce. Evard and Gripple (2001:10) simply state: "Bosses change, peers disappear, and your people find greener pastures ... More and more companies turn to mergers, acquisitions, and reorganizations for what ails them."

M&A activity is not a new organisational change phenomenon. It has been an integral part of modern capitalism since the beginning of the twentieth century (Schweiger, 2002:2; Steger & Kummer *in* Morosini & Steger, 2004:3). The terms 'merger' and 'acquisition' refer to a type of organisational takeover, meaning that two companies come together to become one. Steger and Kummer (*in* Morosini & Steger, 2004:3) describe five major historical M&A waves with distinct key business drivers. "Mergers for monopoly" represents the first wave between 1897 and 1904 when rapid expansion of industries resulted in companies that aimed to gain influence and market power. Between 1918 and 1932 one of the key drivers behind "mergers for oligopoly" was early globalisation, followed by "conglomerate mergers" that took place between 1955 and 1975 and was based on the pursuit of diversification. The 1980s were especially known for hostile takeovers and mega deals. Since 1992 "global mergers" has been a current business reality

based on an attempt to attain environmental influence on an international scale, as well as to meet the growth expectations of capital markets. The last wave is considered to be the biggest in history and is driven by “globalization, technological change, and market deregulation and liberalization” (Schweiger, 2002:3).

On a national level M&A deals form a significant part in the fabric of organisational change as it is. Key drivers of M&A deals in South Africa are private equity, black economic empowerment and cross-border transactions (Thayser, 2007:3). De Villiers, de Villiers and Hattingh (2004:21) link the boom in M&As during recent years to black economic empowerment. Other driving forces behind the M&A scene nationally include investment drives and corporate unbundling and restructuring (Weaver & Keys, 2002:5–7).

Cross-border or cross-cultural transactions, representing the organisational change phenomenon in this research, is steadily increasing related to easing of exchange controls (Thayser, 2007:3). Thayser (2007:4) explains that cross-cultural M&A transactions are additionally creating interesting opportunities in a number of developing markets (Thayser, 2007:4). A cross-cultural M&A refers to a merger or takeover between two companies that does not share a national culture and language (Risberg, 1997:257).

An Ernest and Young survey (Swanepoel, 2009:1) conducted on M&A activity in 2008, identifies 2007 as a record-breaking year for South Africa’s mergers and acquisitions. The same survey, however, indicates that the value of domestic M&A deals declined by 28% in 2008, related to a declining economy worldwide. Considering that M&A activity usually falls at around 50% or more during recessions, the decline in M&A activity during 2008 proved to have been more resilient (Hourquebie in Swanepoel, 2009:1). The resilience portrayed by the national M&A market led to optimistic predictions that declining M&A figures could easily change during the year ahead.

The hospitality environment that reflects the organisational context of this research forms an integral part of the macro business environment. Consolidation, expansion and takeovers, likewise, drive the global hotel market in a context where hoteliers are fighting declining brand loyalty (Anonymous, 2006:1). Hotels are faced with improving efficiency and customer service excellence in an environment in which budgets are shrinking due to a softening global economy (Anonymous, 2006:2). Hotel occupancy is a crucial factor for creating revenue in the hospitality environment. To get ‘bums in beds’ hoteliers are compelled to meet the demands created by the dynamic interplay between the macro and micro business environments. Taking part in an M&A



gamble is often seen by hoteliers and investors as a quick way of getting 'bums in beds', thus lowering their resistance to take M&A risks in order to grow their business.

With a deal value of R312-billion in 2008 in South Africa (Swanepoel, 2009:1), the gloomy track record of M&A deals across different business sectors are disconcerting. It is suggested that most M&A deals do not turn out to be successful as they do not create wealth for the acquiring stakeholder (de Villiers, et al. 2004:21; Michell & Hill, 2004:26). Schweiger (2002:ix) simply states: "Mergers and acquisitions, on average, are not profitable and do not create value for the buying company's stakeholders." A number of studies have estimated the success rates of M&As at no more than 50% (Mitchell & Hill, 2004:23). A recent article (Anonymous, 2009:1) stated that senior business leaders believe just 9% of mega European M&As were completely successful in achieving their stated objectives during the past three years. Senge, Kleiner, Roberts, Ross, Roth and Smith (1999:6) affirm this phenomenon by stating that business' track records do not show sustainability of change. The inability to sustain change initiatives also keeps on repeating itself despite vast financial and human capital investments (Senge, et al. 1999:6).

One of the most frequently quoted reasons for M&A failure is conflicting corporate cultures that arise before and during the integration phase (Habeck, Kröger & Träm, 2000:81; Risberg, 1997:257; Sherman, 1998:226). A culture clash is deemed by Habeck, et al. (2000:81) as "a shocking surprise to most combining companies". A lack of sensitivity regarding cultural issues of the combining entities is mentioned as a reason for this contributing factor to M&A failure (Sherman, 1998:226). Other pitfalls include a lack of understanding of the consequences of the acquisition before it is made, linked to making 'ineffective' decisions, as well as mismanaged change processes during the post-acquisition period (Horovitz in Morosini & Steger, 2004:116/117).

Conflicting corporate cultures, as well as the other pitfalls mentioned, are fuelled by lack of human due diligence – "understanding the culture of an organization and the roles, capabilities, and attitudes of its people" (Harding & Rouse, 2007:125). Hubbard (1999:31) comments that the organisational culture can be seen as a determinant of employee behaviour and provides a formula of how things should be done in a company. The ambiguity to be acquired by another company is mostly a fear-provoking experience for all stakeholders involved, resulting in human suffering and an unhealthy corporate culture. Deal makers are too often simply ignoring or underestimating the importance of people issues in M&As (Harding & Rouse, 2007:125; Mitchell & Hill, 2004:28).

The most obvious consequence of making a deal without conducting human due diligence, is being confronted by employees' resistance to change. Sherman (1998:23) points out that it is a natural phenomenon of people to resist change. Resistance to change is deep-rooted in our underlying fears. Dealing with employees' fears and anxieties may be the most frequently found challenge in sustaining change and the hardest to overcome (Senge, et al. 1999:243). Mills and Smith (2008:433) refer to "persistent patterns of protest". These 'patterns of protest' are triggered by the emotional turmoil created by change. Resistance to change is likely caused by a sense of loss, misunderstanding and a lack of trust, contradictory views and low tolerance for change (Kotter & Schlesinger, 2008:134). The sense of loss is inherently linked to employees' experiences of "worker alienation" whereby change initiatives neither enriches work related tasks and roles, nor membership, thus negatively influencing employees' expectations for work as a source of meaning (Pratt & Ashforth in Cameron, Dutton & Quinn, 2003:315).

The high premium that investors place on economic survival and the tendency to measure work performance in terms of quantifiable financial indicators, while human due diligence is neglected, may ultimately result in employee distress. Hubbard (1999:30) describes 'distress' as a decrease in self-worth, a drop in job performance and a sense of futility during M&A activities. Mental and physical health consequently suffers. Paradoxically, investors often get what they desperately do not want – economic extinction or mere survival instead of economic thriving.

Qualitative research conducted regarding M&A change in a specific hospitality environment confirmed the paradoxical nature of M&A change (Visagie, 2002:86–89). I conducted the research as a response to national and global concerns regarding the influence of M&A change processes on human capital and economic progress in the hospitality environment at the time. The multiple descriptive case study design was realised in two phases. During the first phase the objective was to generate a comprehensive picture of two specific management teams' experiences of M&A change. The next phase focused on the co-construction and description of an M&A team coaching programme guided by a conceptual framework.

The advanced psychiatric nurse practitioner was identified as a key organisational resource to mobilise managers' internal and external resources during M&A change in view of her role as a "sensitive therapeutic professional". (University of Johannesburg, 2009:5). Guidelines intended for programme facilitation were subsequently described for the advanced psychiatric nurse practitioner working as a business team coach in a milieu of M&A change (Visagie, 2002:101–129). The outcome of the programme was envisaged as "empowered team members collectively

supporting change in a context of mental health promotion” (Visagie, 2002:105). M&A team coaching was described as the vehicle for achieving the outcome. The focus on management teams was directed by literature and research that gave evidence of the value of teamwork to gain strategic direction during M&A change (Gmeiner & van Wyk, 2001:4; Gratton & Erickson, 2007:101; Schweiger, 2002:17).

The findings of the research illuminated M&A change as a paradoxical phenomenon with dichotomous realities as mentioned above. On the one hand managers shared stories of being in the dark as a result of the psychological impact of the change process. Their mental health was threatened related to experiences of job and personal insecurity, ineffective communication processes, making arbitrary decisions, distrust, cultural diversity and resistance to change. Psychological and behavioural consequences that emerged as a result of these problem-saturated M&A stories were ultimately reflected in declining productivity and performance patterns. On the other hand, alternative M&A stories were shared of how new meaning was created based on a viewpoint that “change leads to growth” (Visagie, 2002:59). M&A change evolved as a phenomenon with opposite facets – as we move in change, we experience darkness and light (Maurer, 1996:25). Managers clearly yearned to belong and to form part of a bigger organisational team that would respect “each other’s individuality” in conjunction with fostering a sense of “working and playing together” (Visagie, 2002:99).

A number of studies support the findings of the particular research by providing evidence of the adverse influence of diminished personal well-being on synergistic organisational output in organisations undergoing change (Gmeiner & van Wyk, 2001:5, 7/8; Risberg, 1997:257). Team colleagues are reported to lack synergy, and experience emotional discomfort that manifests as a lack of motivation, feeling lost, angry and unproductive as a result of organisational change (Gmeiner & van Wyk, 2001:5). A team-based approach is therefore proposed as a sensible strategy for dealing with the perpetually changing organisational world of the 21<sup>st</sup> century (Gmeiner & Perkins, 2006:55). Fitz-Enz (1997:120) agrees that a team-based approach implies teamwork, driven from a long-term commitment to work collaboratively as a community, based on collaborative values that stimulate synergy and productivity.

Though teamwork is often described as “the only way to assemble the knowledge and breadth required to pull off many complex tasks businesses face today”, research into team behaviour has revealed yet another interesting paradox (Gratton & Erickson, 2007:102). The same qualities of teamwork that are proposed to ensure the success of a major initiative like an acquisition, such as

being diverse, virtual and composed of highly skilled stakeholders may make it hard for teams to get anything done. Gratton and Erickson (2007:102) found in their research that diversity, seen as essential to spark insight and innovation might, however, also create problems; in reality team members cooperate with each other more authentically if they perceive themselves as being alike. Also, “the greater the diversity of background and experience, the less likely the team members is to share knowledge and exhibit other collaborative behaviors” (Gratton & Erickson, 2007:102).

Working together from a virtual stance, meaning that team members are spread across multiple locations, also creates unique challenges regarding collaboration. According to this research, the more virtual teams become the more cooperation declines (Gratton & Erickson, 2007:102). Working with different stakeholders to achieve a common goal, can be highly stressful. It is a well-known phenomenon in the hospitality environment that teams consist of a vast number of stakeholders like independent hotel owners, customer experience experts, brand managers, and regional heads, each with his or her own agenda and expectations. Gratton and Erickson (2007:102) maintain that the greater the proportion of specialists a team had, the more likely it was to disintegrate into non-productive disagreement.

It can therefore be argued that cross-cultural M&As have an even greater risk to fail (Risberg, 1997:257). These M&As are characterised by the merging of diverse, often divergent, organisational cultures. They often operate from different locations, especially in the case of multi-national M&As, and have to work with a number of different stakeholders to achieve a common purpose. In the case of a cross-cultural M&A, as in the case of this research where a Southern African hotel and property group acquired a hotel in Swaziland, the situation is aggravated not only by the corporate culture that can create obstacles, but also by differences in nationality, language, background and experiences (Risberg, 1997:257).

Cross-cultural M&As are clearly an important phenomenon of organisational life in a globalised world. The acceleration in the rate of change as a consequence of this phenomenon creates an increasing need for reorganisation. Decisions regarding successful reorganisation or change strategies are imperative for a smooth cross-cultural M&A integration. A modernist approach would be to find ways to resolve the inherent paradoxes in this change phenomenon (Thatchenkery *in* Cooperrider & Avital, 2004:77). Examples of modernistic change theories include Lewin’s three-step change theory and Lippitt’s phases of change theory (Kritsonis, 2008:1–3). From the perspective of these theorists those consequences of M&As perceived as

problems, need to be eliminated. Change management, including integration strategies, are therefore chosen from a deficit-discourse, meaning that strategies are about detection of error, analysis of chronic problems or the “exclusive treatment of the deficient, the broken and the problematic” (Cooperrider & Avital, 2004:xi).

In a deficit-oriented context, employees are often seen as a resource of securing the financial investment of the M&A. They should therefore be subjugated speedily, focus on their work and accept matter without complaint – in other words, basically fit in or move out. The assumption that people are necessary but replaceable is maintained. The danger of this approach is that employees are seen as workers and not as wholistic human beings, bringing their whole selves to work. Barriers to successful integration are fuelled because employees experience being treated like robots (Evard & Gipple, 2001:335; Covey, 2004:15).

Since 1987 a “theoretical metamorphosis” has been evident in the fields of organisational development and human systems change (Cooperrider & Avital, 2004:xi). This positive wave has come from developments that are described as “a transformational change process” in which people “inspire each other to leverage their most powerful collective stories in order to dream and design a new affirmative future” (Ricketts & Willis, 2001:5). This emerging field is simply called Appreciative Inquiry, referring to a “transformational organisation change process” (Ricketts & Willis, 2001:5).

Appreciative Inquiry developed within Social Constructionism and fits the post-modern philosophy. Paradoxical experiences that bring about change are embraced as “a basic ontological condition of organizational processes” (Thatchenkery in Cooperrider & Avital, 2004:77) or, as Charles Handy (1994:12–13) concludes: “Paradox I now see to be inevitable, endemic, and perpetual. The more turbulent the times, the more complex the world, the more paradoxes there are ... like the weather, something to be lived with, not solved...accepted, coped with, and made sense of, in life, in work...”.

I stumbled upon Appreciative Inquiry when I did my master’s study. I was intrigued by its paradigmatic underpinnings and its methods. As a result I chose Appreciative Inquiry as the paradigmatic approach for the M&A team coaching programme that was generated from the findings of my master’s study. I tried to marry Appreciative Inquiry with business team coaching on a theoretical level. The operational philosophy of the company in which the research was conducted, guided the business team coaching component. The company identity unfolded as a

“team based organisation” and team coaching was used as an ongoing intervention to “unleash superior performance” (Company Brochure, 2005:7).

The business team coaching focus of the programme was further substantiated within literature and research that proclaim the ongoing development of human potential as a critical business success factor (Johnson & Drake, 2000:1; Skiffington & Zeus, 2006:6; Stober & Grant, 2006:2). Team coaching is a specific form of business coaching. It recently emerged as a relevant, highly acclaimed strategy for generating new meaning in teams exposed to organisational change (Bushe, 1998:1; Johnson & Drake, 2000:1; Kaya & Kleiner, 1996:4). Team coaching provides an “artful, compassionate and incisive” way in which an environment may be reorganised for team learning to emerge (Senge, *et al.* 1999:106). An additional benefit of team coaching is the fact that it is generally more cost effective and time efficient for clients (Skiffington & Zeus, 2006:11).

I entered the hospitality environment in 2001 as a psychiatric nurse practitioner. I left it in 2007 as an advanced psychiatric nurse practitioner and professional business and team coach. My personal assumption was, and remains to be, that sustained organisational performance should be viewed from a wholistic perspective, honouring the complexities of the human and organisational spirit. I was curious to discover how managers’ mental health could be facilitated through an M&A team coaching programme underpinned by Appreciative Inquiry in the context of a cross-cultural M&A. I wondered about the affect of such a programme on sustained performance, thus recognising the importance of sustained performance in securing long-term success of an M&A. This left me with a number of questions that inspired this research. Would the M&A team coaching programme that I generated as part of my master’s study succeed in facilitating managers’ mental health in a context of a cross-cultural M&A? Would the programme create a context conducive to sustained performance, based on its intent to cultivate an environment conducive to mental health facilitation?

The **motivation for conducting** this research should be viewed from an integrated perspective. In the **first** place M&A activity, with specific reference to cross-cultural M&As, is a **relevant organisational change phenomenon** that is projected to continue in the foreseeable future. An Ernest and Young survey (Swanepoel, 2009:1) confirms this notion by predicting that the worldwide M&A boom of the past decade has not quite run its course, in spite of the turbulent economic legacy of 2008. **Secondly**, the **hospitality environment** that represents the organisational context of this research has been **particularly active in M&A activities**. It remains a relevant context to study within an organisational landscape where economic borders

are deteriorating while cultural barriers remain (Skiffington & Zeus, 2006:1/2). **Thirdly**, a glimpse into the global history of M&A deals raises a **gloomy picture of its potential to succeed** (de Villiers, *et al.* 2004:21; Risberg, 1997:257).

Current organisational discourse, based on empirical evidence, indicates the existence of **competing forces hindering successful M&A outcomes**, such as imbalances between human due diligence and organisational due diligence. **Modernistic, deficit orientated organisational change theories** additionally influence the choices of most M&A integration interventions, thus exhausting human potential (Thatchenkery *in* Cooperrider & Avital, 2004:77). The **mental health of managers is threatened** in merged organisations where these conditions drive integration processes. **Fourthly**, a **team-based approach, focussing on communities working together to achieve a common goal**, is further described as vital in an **organisational environment constantly in flux**.

Bearing the above in mind, I asserted that there was a **relevant need** to conduct research with a view to facilitate managers' mental health in a context of a cross-cultural M&A. This need was further confirmed by the national pursuit to "promote the mental health of people in the workplace" as an integral part of health (African National Congress, 1994:20).

The **significant contribution** of this research is, therefore, the **generation of a worthy Appreciative M&A team coaching programme** in a context of a cross-cultural M&A extending from previous research. The use of **Appreciative Inquiry** as a positive change theory discerns it from deficit orientated organisational change theories. The focus on the **mental health of managers engaged in cross-cultural M&A** distinguishes this programme from others in the hospitality setting. The programme presents the emergence of a new theory that has the potential of enhancing, predominantly, the practice area of business coaching, thus stimulating social transformation. The field of advanced psychiatric nursing science is indirectly influenced, based on the fact that an advanced psychiatric nurse practitioner crossed the borders from the mental health sector to the business sector, conducting research in a cross-cultural M&A context, thus integrating the role of the advanced psychiatric nurse practitioner and the business team coach.

It is further envisaged that the research will result in knowledge transfer on different complementary levels. Firstly, by publishing articles from the research report in accredited peer-reviewed journals. Secondly, to continue to present research papers at national and international research, nursing, education and business conferences. Two research papers have already been

presented at international conferences - a philosophy, psychiatry and psychology conference and a qualitative research conference - resulting in abstract publications (Visagie, Poggenpoel & Myburgh, 2006:83; Visagie, Poggenpoel & Myburgh, 2007:119). Thirdly, to publish an Appreciative M&A team coaching book based on the research findings.

### 1.3 PROBLEM STATEMENT

*"I have not ceased being fearful, but I have ceased to let fear control me. I have accepted fear as part of my life – specifically the fear of change, the fear of the unknown, (the fear of the empty spaces haunting me) and I have gone ahead despite the pounding in my heart that says: turn back, turn back..."*

Erica Jong as adapted (in Maurer, 1996:151)

The above poem mirrors change as a story of paradox. Mismanaged M&A change creates personal and collective disharmony, posing a threat to the mental health of those involved in the change. Alternatively, change may produce energy that is needed for growth and learning on different levels. The challenge lies in facilitating these paradoxical experiences in such a way that fear of the unknown is balanced with the acquisition of skills for adaptation and equilibrium. The reality, however, is that companies often merge in terms of structural and procedural processes, but fail to merge potential human threats and possibilities that are an intrinsic part of the change process. Failure to merge these two aspects is related to the different expectations from various stakeholders and the complex nature of M&As. It also seems as if organisations lack the ability to learn from previous mistakes and consequently repeat them in the next change process (Hubbard, 1999:5). This is evidenced in the high failure rate of M&A initiatives directly linked to default in addressing the needs of employees effectively (Grove, 2004:35).

One's work is believed to provide one with economic gain, social status, a sense of belonging and predominantly a sense of meaning (Pratt & Ashforth in Cameron, et al. 2003:307). Yet, many stories told of M&A change mirror an experience of perceived meaninglessness related to the crisis situation that is evoked by this intricate change phenomenon. In my previous research M&A change manifested as a personal and collective crisis that influenced managers' mental health negatively as evidenced by experiences of emotional turmoil, friction and alienation (Visagie, 2002:7).

Meaninglessness and alienation are reflected in anomic patterns described in Durkheim's sociological texts (Gallo, 1974:31; Mizruchi, 1964:45). Anomie is closely associated with rapid



changes occurring in the economic system and reflects a social state in which the society's norms and goals are no longer capable of exerting social control over its members, and the individual rather than the group must determine what goals should be sought (Mizruchi, 1964:45). M&A activities is known to create cultural diversity that may result in a process where the individual feels alienated in the work environment based on a breakdown in the cultural structure. Alienation in an M&A context denotes an estrangement between a person's internal and external environment related to significant M&A specific-experiences. The feeling associated with the person's estrangement is combined with loss of identity or authentic being (Gallo, 1974:28/29).

DeGrazia (in Mizruchi, 1964:47) describes three characteristics in response to Durkheim's work that forms part of the subjective experience of anomie which can be linked to M&A change, namely a "painful uneasiness or anxiety, a feeling of separation from the group or isolation from group standards, a feeling of pointlessness." These subjective experiences are evident in declined productivity related to a weakening of employees' commitments to organisational goals. The organisational system plays a significant role in M&A related anomie by failing to communicate and reinforce negotiated cultural norms during the process of integration.

An organisational context where human due diligence is at best superficial and at worst nonexistent will most likely trigger employee experiences of anomie. Anomic patterns furthermore impact on the psychological contract between the acquirer and employees, as there is a direct shift from collective goals to personal goals. According to Rousseau (in Linde & Schalk, 2008:305) the psychological contract consists of individual beliefs that are shaped by an organisations' culture and business practices. It entails an exchange agreement between individuals and their organisation. Individual beliefs are mostly seated in mutual expectations and obligations based on perceived promises. Employee promises relate, amongst others, to job performance, loyalty and ethical behaviour. The acquirers' promises are mostly embedded in the provision of organisational support, career development, supporting social activities, a fair managerial policy and the provision of an optimal working environment (Linde & Schalk, 2008:307). An experience of contract violation is a consequence of perceptions by one or both parties that promises were made, but not kept in the acquirer-employee relationship (Linde & Schalk, 2008:317). Both parties involved in the M&A deal may feel that they are cheated in some way. The psychological consequences of perceptions of unfair human, labour and integration practices may result in personal and collective behaviour that hinders optimal organisational performance.

My previous research gave clear evidence of managers' experiences of psychological contract violation in their relationship with the acquirer. It was evident that an experience of unfulfilled promises consequently drained organisational commitment (Visagie, 2002:62). These managers expressed the fear of losing their dignity and pride in a context where they experienced that top management did not "appreciate" them and that "people don't really matter" (Visagie, 2002:63). Intentions to quit, rooted in an experience of pointlessness, may become stronger where people feel unappreciated (Msomi, 2006:2). The need to quit is often fuelled by an increased sense of self-devaluation, an impaired sense of belonging and anxiety related to value conflict between employees and the acquirer. This clearly influences employees' performance patterns and may result in the company losing valuable talent (Harding & Rouse, 2007:125).

Sustained performance, crucial for the long term success of an M&A, emerged as a relevant challenge in such a setting. According to Mankins and Steele (2005:65) most companies' strategies deliver only 60% of their promised financial value. This is linked to an ineffective relationship between strategy and execution. Strategy refers to the planned M&A implementation in this research, while execution entails the direct or indirect operationalising of the strategy by relevant stakeholders. Operational managers who represent the key stakeholder group of this research are most vulnerable to the "execution gap" (Anonymous, 2006:2). Pfeffer and Sutton (2000:6) link the execution gap to inefficient management systems and practices.

Top management is increasingly investing in business coaching as a vehicle to bridge the execution gap during organisational change to reduce the likelihood of managerial performance shortfalls. Whitmore (*in* Stober & Grant, 2006:3) proposes that "coaching is unlocking a person's potential to maximize their own performance". Kilburg (*in* Stober & Grant, 2006:3) is referenced by the same authors saying that the coaching relationship is essentially about assisting clients "to improve their professional performance and personal satisfaction and consequently to improve the effectiveness of the client's organization within a formally defined coaching relationship". Bresser (2005:n.p.) affirms that coaching is recognised by decision-makers as an incredible foundation of competitive advantage in today's business world.

My engagement as a business and team coach with management teams engaged in M&As created in me a stark awareness of how extensively value conflict occurs in these contexts. These value conflicts are clearly embedded in competing paradigms. I noticed a stream of discrepancies between the human and economic development emphasis of various stakeholders that trickled through to all areas, including the coaching process. Company stakeholders, such as

investors and executives, seemed intent on getting a return on both the M&A deal and the M&A coaching intervention. They measured return on investment mainly in terms of revenue and turnover. Harding and Rouse (2007:124/125) express the same opinion, namely that deal makers “gather reams of financial, commercial, and operational data, but their attention to ... the roles, capabilities and attitudes of its people” is often superficial. Naturally they expect the coach to provide measurable results, preferably in terms of financial returns.

In contrast, the managers I worked with, coded return on investment from both the M&A and coaching process differently. They called for job satisfaction, job security, appreciative relational practices and adequate compensation. Msomi (2006:2) states that talented individuals want a job they are passionate about, work that excites them, career opportunities that enrich them and company leaders that inspire them.

Personally I found it difficult in my coaching role to marry these seemingly paradoxical agendas at times. Literature confirms this reality (Baanders, 2005:49; Sherman & Freas, 2004:86). As an advanced psychiatric nurse practitioner I was very much aware of the potential influence of these often competing paradigms, needs and realities on the mental health of all stakeholders involved in the triangular M&A coaching relationship, consisting of the company stakeholders, the client (management team) and the business team coach (Dembkowski, Eldridge & Hunter, 2006:12).

M&As are well documented business activities evidenced by the vast number of books, articles and the amount of media attention devoted to these endeavours. Academics, management consultants and company executives alike ascribe the dismal track record of M&As to the inability to manage the integration of both partners after the merger has taken place (Morosini & Steger, 2004:xi). Similarly, the findings of my previous research identified the implementation phase – predominantly aiming at a smooth integration – as the “most stress provoking” period of the M&A, thus posing the biggest risk to managers’ mental health (Visagie, 2002:84). M&A integration is the process by which one company merges with the other. It necessitates M&A implementation activities that will result in synergies to justify the investment (Schweiger, 2002:x).

Baanders (2005:49) agrees that change management is one area in which the absence of a properly managed implementation process may result in failure. According to literature, employee productivity may drop by as much as 50% during the implementation phase, and it may take up to two years to be rectified (Grubb & Lamb, 2000:30; Wishard *in* Hubbard, 1999:32). It is thus rather surprising that very few authors have actually presented systematic, pragmatic evidence of how

to deal with factors that are central to the success or failure of international M&As from the perspective of implementation (Morosini & Steger, 2004:xi).

The outcome of my previous research was the generation of an M&A team coaching programme that ultimately aimed to “promote” managers’ mental health during the implementation period of a context-specific M&A process (Visagie, 2002:103). I therefore, unintentionally at the time, addressed the perceived gap described in literature regarding insufficient research-based M&A implementation processes. The programme, representing emerging theory, was generated from the empirical findings of the research and a literature control to re-contextualise the new theory for applicability in other settings (Morse & Field, 1996:107). I could, however, not assume that the programme was credible in terms of providing systematic, pragmatic evidence regarding effective M&A implementation practices, because it had not yet been exposed to implementation and valuation activities. In order to honour theory as an enabling agent of social transformation (Cooperrider, *et al.* 2001:59) and to provide empirical evidence of programme worth, it was thus crucial to implement and value the programme.

An opportunity to respond to the need to implement and value the existing M&A team coaching programme emerged soon after the completion of my master’s study. I was invited by the Director of Organisational Development of the same company in which I conducted my previous research, to implement the programme. The M&A was situated within a cross-cultural context. Cross-cultural M&As have unique challenges related to different languages and national cultures (Risberg, 1997:257). Organisational scholars recognise the influence of national cultures on employees’ work attitudes and behaviours. These scholars assert that being brought up in a particular country influences people’s psychological make-up with reference to values, beliefs, attributions and decision-making tendencies (Brockner *in* Kramer & Staw, 2003:334). The applicability of the programme was therefore questionable against the backdrop of diverse national contexts (de Vos, Strydom, Fouchè & Delpont, 2005:345; Merriam, 1991:173).

In **summary**, **M&A change** emerged as a **high risk, complex phenomenon** with multiple integrated realities that form part of the research problem. I was, therefore, compelled to conduct this research based on personal experience and supporting research evidence describing **M&A change as a paradoxical process that is often managed from a problem-deficit discourse** (Cooperrider & Avital, 2004:xi; Visagie, 2002). One of the most common outcomes linked to M&A change is an experience of **meaninglessness and alienation** that interferes with managers’ job satisfaction, their mental health and their experiences of the psychological contract, ultimately

hindering sustained performance patterns needed for the long-term success of an M&A. Secondly, a relevant M&A coaching challenge emerged from the business and team coach's roles in **marrying different – often competing – stakeholder agendas**; ensuring returns on coaching investments. A third aspect of the problem statement refers to the **gap** described in literature regarding **substantial and pragmatic evidence on how to facilitate M&A implementation processes** in particular. I was in possession of such evidence in the form of an M&A team coaching programme that focused predominantly on the implementation phase, but it **lacked credibility** because it was not practically lived and exposed to valuation. Lastly, the **invitation to implement this programme** in the context of a Southern African hospitality environment that represents a cross-cultural M&A raised questions regarding applicability.

In view of the problem statement the **research questions** below were asked:

- Can an existing M&A team coaching programme to facilitate managers' mental health for sustained performance be applied to a Southern African hospitality environment?
- If the programme is applicable, how should it be implemented, valued and refined as a foundation to generate a worthy Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance in a Southern African hospitality environment?

#### 1.4 RESEARCH AIM AND OBJECTIVES

The aim of this research was to generate a worthy Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance in a Southern African hospitality environment. In order to achieve the overall aim, the research was conducted in **three phases** with specific objectives:

- **Phase one:** Conduct a **situational analysis** to explore and describe managers' experiences of a cross-cultural M&A, as well as their **recommendations** for improved M&A implementation practices to establish the applicability of an existing M&A team coaching programme in a Southern African hospitality environment.
- **Phase two:** Describe a **refined conceptual framework** of an Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance in a Southern African hospitality environment, incorporating **programme implementation guidelines** based on the findings of Phase one, and **implement the programme**. Explore and describe the experiences of managers of programme implementation in order to **value** and **refine** the programme.

- **Phase three: Valuate the worth of the programme** from an expert stakeholder and auto-ethnographic perspective, followed by the **generation of programme refinement recommendations** to improve future programme applicability in a Southern African hospitality environment.

## 1.5 PARADIGMATIC PERSPECTIVE

Research is an interactive approach, shaped by the beliefs of the researcher. A paradigm is described as a collection of mutually accepted convictions that provides a model for scientific practice (Mouton & Marais, 1992:149). It incorporates meta-theoretical, theoretical and methodological assumptions that inform the scientific process. Social Constructionism was selected as the overarching meta-theoretical paradigmatic perspective of this research. The theoretical paradigmatic perspective is based on Appreciative Inquiry (Cooperrider, *et al.* 2004:xii–xiii), complemented by the Theory for Health Promotion in Nursing (University of Johannesburg, 2009:1–8).

### 1.5.1 Meta-Theoretical Perspective: Social Constructionism

Social Constructionism developed within the post-modern philosophy. Post-modern thinking concentrates on our current, global mode of interaction and our need to attend to issues of diversity (McNamee & Gergen, 1994:191). Authors associated with defining the contours of Social Constructionism are Gergen, Derrida, Foucault, Lyotard and Eberts (Denzin & Lincoln, 2005:305). The post-modern way of thinking differs from the modernistic viewpoint that it is possible to find essential, objective facts that provides us with generally applicable theories bringing us closer to an accurate understanding of the universe (Friedman & Coombs, 1996:20). Denzin and Lincoln (2005:961) support this notion by indicating that the post-modern argument is not against other schools of thought, only against their claim to authoritative knowledge and the absolute truth.

Social Constructionism represents an approach to human science inquiry and practice characterised by a relational focus emphasising the notion that the world people create in the process of social exchange constitutes their reality (Cooperrider, *et al.* 2004:xviii). Reality is the result of social processes accepted as 'normal' in a specific context (Denzin & Lincoln, 1994:127). Knowledge is not something that a person has, but something people do, as knowledge claims are intelligible and debatable only within a particular context or community (Burr, 1995:8; Denzin & Lincoln, 2005:50).

Cooperrider, et al. (2004:xviii) state that Social Constructionism implies a decisive shift in Western intellectual tradition from an individualised to a community-based focus. Dialogue is seen as the driving force for the construction of reality and organisations viewed as the products of social construction. David Parè (in Friedman & Coombs, 1996:19/20) describes three different stances regarding human knowledge of reality and writes that things have “been evolving from a focus on the observed world as object, to a focus on the observing person as a subject, to a focus on the place between subject and object, that is, the inter-subjective domain where interpretation occurs in community with others.” In essence constructionism implies a concern with the dialogical processes by which people, their values, their reasoning, scientific knowledge and communities are constructed and reconstructed through dialogue (Cooperrider, et al. 2004:xviii).

Individuals are thus socially shaped by the cultural and historical context they are part of, and the particular forms of discourse their language creates. There is “no clear window into the inner life of an individual or a community, because any gaze is always filtered through the lenses of language, gender, social class, race and ethnicity” (Denzin & Lincoln, 1994:12). Reality may, therefore, not be separated from its reconstitution, and the world known by people is the world as represented (Hassard & Parker, 1994:27).

The power of dialogue is inherent in its potential to create social transformation in an organisational context that reflects rapid change. For the purpose of this research the following dialogical assumptions applied (Gergen, Gergen & Barrett in Cooperrider, et al. 2004:6–11):

- Dialogue originates in a relational or public space and is a form of inter-subjective connection.
- Dialogue inspires joined action and meaning.
- Dialogical efficiency is bodily and contextually embedded, meaning that language cannot be separated from the rest of the life sphere – where individuals are at any given point in time influences their language and how they construct meaning.
- Dialogical efficiency is historically and culturally situated – what works dialogically in one context may lose its power to direct activity in another setting.
- Dialogue may serve diverse purposes, both positive and negative. The value placed on dialogical outcomes may vary considerably from one standpoint to another.

In a cross-cultural organisational setting where Western and traditional ways are merged, dialogical sensitivity should be a prerequisite. Within this environment, the language that

stakeholders publicly share in the inter-subjective space, construct their realities. Past experiences have influential power in meaning construction. In an organisational environment where managers have been exposed to prior M&As, it can be expected that meaning construction will be embedded within past experiences, reflected by recurring narratives that are either positive or negative. Hassard and Parker (1994:31) argue that transformational failure is often related to a multi-faceted fit between the organisation, culture and an inhospitable environment, providing enormous opportunity for the construction of meta-narratives that reflect maladjustment in the form of problem-saturated dialogue (Hassard & Parker, 1994:31). Realities are organised and maintained through either positive- or negatively-inclined narratives: “If the realities we inhabit are brought forth in the language we use, they are then kept alive and passed along in the stories that we live and tell” (Friedman & Coombs, 1996:30). “One of the prominent strengths of the constructionist perspective is that it seeks to open the door to a fuller interweaving of disparate communities of meaning”; hence, the birth of Appreciative Inquiry (Cooperrider, et al. 2004:xviii).

### **1.5.2 Theoretical Perspectives: Appreciative Inquiry And Theory For Health Promotion In Nursing**

Appreciative Inquiry - a significant new approach to organisational transformation - and the Theory for Health Promotion in Nursing are complementary in terms of the principle of wholeness endorsed by both these theories. A description of these theoretical perspectives follows with specific reference to the core principles and assumptions of each.

Appreciative Inquiry emerged from the doctoral work of David Cooperrider at Case Western Reserve University between 1980 and 1986. He commenced his research from a deficit discourse, asking, “What is wrong with the human side of the organisation?” He soon discovered that questions posed from a deficit discourse resulted in people losing energy and engagement, yet, when they were asked about success stories, their energy and engagement levels soared (Preskill & Catsambas, 2006:8/9). Cooperrider (in Cooperrider, et al. 2004:xii) defines Appreciative Inquiry as a “constructive inquiry process that searches for everything that ‘gives life’ to organisations, communities, and larger human systems when they are most alive, effective, creative and healthy in their interconnected ecology of relationships”. Cooperrider and Whitney (2005:1) describe it as a “positive revolution in the field of organization development and change management.” Appreciative Inquiry is based on an optimistic viewpoint focusing on the potential for good and growth that is inherently part of the human condition (Cooperrider, Sorensen, Yaeger & Witney, 2001:ix). Appreciative Inquiry, as an organisational transformation process,



deals with diversity, global social change and with conflict in a positive sense (Cooperrider, et al. 2001:ix–x).

Preskill and Catsambas (2006:1/2) define it as a “group process that inquires into, identifies, and further develops the best of ‘what is’ in organizations in order to create a better future”. Appreciative Inquiry is both a philosophy and a process for generating the kinds of organisations in which people feel inspired and psychologically safe to be the best versions of themselves. Appreciative Inquiry addresses organisational realities from an appreciative stance. Instead of focusing on what is not working and why, it asks organisational stakeholders first to discover what is working significantly well and then to envision or dream what it might be like if ‘the best of what is’ occurred more frequently. Organisation members then design and implement strategies to ensure that the desired changes form part of their collective destiny (Preskill & Catsambas, 2006:2). It is essentially driven by affirmative propositions or appreciative topic choices – “those powerful affirmative statements that inspire a group toward its ideal future” (Ricketts & Willis, 2001:5).

Gervase Bushe (1998:1; 2001:4) described in earlier work how an Appreciative Inquiry approach can be used as a vehicle, to facilitate M&A change in teams. In a more recent article he emphasises that Appreciative Inquiry “is not (just) about the positive” (Bushe, 2007:30). Instead, the core of Appreciative Inquiry is its “generativity” because, as a scientific organisational change approach, it gives people new ways to think about social structures, phenomenon and institutions that engender new options for action. He actually suggests that Appreciative Inquiry should be called “Generative Inquiry” (Bushe, 2007:30).

I agree with Bushe’s argument that Appreciative Inquiry is not only about the positive. I have personally conducted a number of Appreciative Inquiry processes and witnessed how people would spontaneously share those things that are ‘not working’. The generativity of the approach is, however, embedded in the way that the questions are structured, in conjunction with the construction of an affirmative environment fuelling the generation of new options. As Preskill and Catsambas (2006:3) contend, it is in essence “a movement toward appreciative language”.

The following seven **core principles** present the foundation for Appreciative Inquiry in this research (Preskill & Catsambas, 2006:10–11).

### **1.5.2.1 Constructionist principle**

Underlying the process of Appreciative Inquiry is the assumption that social knowledge and organisational destiny are interwoven (Preskill & Catsambas, 2006:10). In essence it means that the future of the organisational world is constructed and sustained through the language used by individuals and the relationship they have with each other. The stories that emerge in the research context have the power to limit individuals' options as well as to expand the possibilities they can dream of and create (Sloan & Canine, 2007:2). If the stories are changed, the inner dialogue of the organisation changes. Bushe (2002:2) contends that the inner dialogue is a powerful stabilising force in organisations that explains the failure to follow through on decisions arrived at rationally.

### **1.5.2.2 Principle of simultaneity**

Inquiry and change are co-existing forces. Change begins with the first question asked (Sloan & Canine, 2007:3). Questions are a form of intervention. What I chose to ask as a researcher set the stage for what is discovered and how the future actually turns out (Cooperrider & Sekerka *in* Cameron, *et al.* 2003:227). Cooperrider (*in* Srivastva, Cooperrider & Associates, 1990:6) holds: "The power of positive suggestion plants a seed that re-directs the mind ... towards a positive goal."

### **1.5.2.3 Poetic principle**

Reality, as a human construction, creates potential for an organisation, with reference to the organisational environment of this research, to continuously co-author its story. Stakeholders are free to choose which part of the story to inquire about – its challenges and needs, or its moments of celebration, innovation and joy, or both. The choice of the inquiry affects the direction of the organisation (Preskill & Catsambas, 2006:10). In a sense this principle legitimises differing views, expanding the awareness of the stakeholders of the research process and generating opportunities to deepen appreciation of those differing views (Sloan & Canine, 2007:3). What I therefore choose to study as a researcher makes a difference to the world as it is known by those engaged in the research endeavour (Whitney & Trosten-Bloom, 2003:54).

#### **1.5.2.4 Anticipatory principle**

According to this principle the image that an organisation has of its future guides the organisation's existing behaviour. If the image of the future is constructed in a hopeful and positive way, it is believed to activate positive present day action (Preskill & Catsambas, 2006:10). I envisioned that the implementation of the initial M&A team coaching programme would trigger a positive future image evidenced in managers' current execution practices.

#### **1.5.2.5 Positive and free choice principle**

This principle postulates that human beings have the ability to direct their choices. They can choose to focus on deficits or strengths (Sloan & Canine, 2007:2). Positive questions that amplify the positive core lead to positive change (Whitney & Trosten-Bloom, 2003:54). Organisational performance is enhanced when stakeholders on all levels have the freedom to choose how and what they will contribute (Preskill & Catsambas, 2006:11). Stakeholders who formed part of the triangular coaching relationship were thus viewed as inherently good with the freedom to make choices driven by a negotiated value set.

#### **1.5.2.6 Enactment principle**



To create change it is essential to “be the change we want to see” because to act “as if” is self-fulfilling (Whitney & Trosten-Bloom, 2003:54). Jones (n.d.:CDRom) simply states: “There’s no use in walking anywhere to preach, unless your walking is your preaching ...”. Positive change arises when individuals have a model of the ideal future and are fully present in the here and now (Preskill & Catsambas, 2006:10). In this research it meant elevating personal and collective consciousness of all stakeholders through an M&A team coaching programme with the hope of fostering increased organisational consciousness.

#### **1.5.2.7 Wholeness principle**

Wholeness refers to personal and organisational interconnectedness in the research context. It includes the assumption that Appreciative Inquiry can result in a “positive grass roots revolution” by engaging the most appropriate stakeholders in the M&A team coaching programme (Rossi, 1999:n.p.; Sloan & Canine, 2007:3/4). Preskill and Catsambas (2006:10) assert: “Wholeness brings out the best in people and organizations ... It is related to understanding the whole story, engaging with the whole system, and sharing one’s whole person”. Watkins and Mohr (2001:xxxi)

additionally point out that Appreciative Inquiry is underpinned by theory and practice for addressing change from a wholistic framework.

The wholeness principle endorsed by Appreciative Inquiry correlates to the core assumptions of wholeness reflected by the Theory for Health Promotion in Nursing (University of Johannesburg, 2009:4–6). The four central components of the Theory for Health Promotion in Nursing, namely individual, advanced psychiatric nursing, environment, and mental health are defined in the context of this research as follows:

- An **individual**, including all relevant stakeholders in this research, embodies dimensions of body, mind and spirit. The person functions in a wholistic interactive manner with the external environment (University of Johannesburg, 2009:4).
- **Advanced psychiatric nursing** is an interactive process where the advanced psychiatric nurse practitioner, as a sensitive therapeutic professional, aims at facilitating managers' mental health through the mobilisation of internal and external resources (University of Johannesburg, 2009:4). The advanced psychiatric nurse practitioner has a clinical master's degree in psychiatric nursing science, with additional clinical experience under the supervision of clinical specialists in psychiatric nursing or related disciplines. She has ventured into an in-depth scholarship that is underpinned by comprehensive knowledge, skills and competence in the practice area of psychiatric nursing science (Greeff & Poggenpoel, 1991:24). The advanced psychiatric nurse practitioner in this research context is additionally fulfilling the role of a **business team coach**, meaning that she strives consciously to generate collective learning and growth with the intent to facilitate sustained performance in the context of a cross-cultural M&A.
- **Environment** contains both **internal** and **external** environments. The **internal environment** consists of three dimensions, namely body, mind and spirit. It includes both the internal stakeholder environment, as well as the internal organisational environment. The **external environment** includes the physical, social and spiritual dimensions. It refers again to the external environment of the individual stakeholder, as well as to the external environment of the organisation (University of Johannesburg, 2009:5).
- **Mental health** is a dynamic interactive process in individual stakeholders' internal and external environments (University of Johannesburg, 2009:5). The etymology of the phrase 'mental health' stems from the Latin term 'mens' and the Greek term 'nous' that both refer to the mind (Braithwaite, 2006:1724). The mind is in charge of a person's thoughts and feelings and is the seat of a person's sense of reason (Braithwaite, 2006:1724). From a wholistic perspective mental health is defined as an evolving, interactive process in which

an individual's internal demands and needs are brought into a harmonious relationship with the reality of the external environment (Perko & Kreigh, 1988:24; University of Johannesburg, 2009:5). The nature of the interactions between all stakeholders' (managers, company stakeholders and team coaches) internal and external environments, therefore, contributed or interfered with the facilitation of managers' mental health in the context of this research (University of Johannesburg, 2009:5).

### **1.5.3 Theoretical Definitions**

The central concepts pertaining to this research are defined below.

#### **1.5.3.1 Merger and Acquisition (M&A), including cross-cultural M&A**

The terms 'merger' and 'acquisition' are often used interchangeably in literature or media reports probably because both terms indicate a type of organisational takeover (Sherman, 1998:8). A merger is described as two companies uniting, usually through the exchange of shares resulting in the formation of a new corporation (Hubbard, 1999:6; Sherman, 1998:9). An acquisition is typically a takeover in which one company purchases the assets or shares of a target company (Sherman, 1998:9). A cross-cultural M&A is defined as an M&A between two companies that does not share a similar national culture and language (Risberg, 1997:257). Brockner (*in* Kramer & Staw, 2003:360–361) is of the opinion that an employees' country of origin is likely to have an impact on his or her relationships with others in the work environment.

The term M&A, in the context of this research, refers to a specific organisational takeover that took place between a property and hotel group, representing a Southern African hospitality environment, and a hotel in Swaziland. It entails a cross-cultural M&A throughout the text, even if it is not consistently specified. The specific property and hotel group is referred to as either the acquirer or the company in the context of the research. The company was listed on the Johannesburg Stock Exchange in March 2006. The company portfolio consisted of a hotel and resort division, real estate, facilities management, fleet solutions and a business solutions division. The growth initiative of this company resulted in a number of M&As, including cross-cultural M&As, with reference to the acquisition of hotels across the borders of South Africa in the Southern African hemisphere. The hotel in Swaziland represents the target company and the term 'hotel' is used to refer to the specific organisational context. It was the first cross-cultural M&As in this company.

### 1.5.3.2 M&A change

M&A activities imply change within organisational contexts. M&A change is seen in this research as an organisational change process driven by two key elements. Firstly, pressure on the old culture and norms of an organisation; secondly, learning experiences that facilitate a paradigm shift from old theories and practices to new ones (Harsman & Phillips, 1994:17). M&A change does not suggest a linear process, rather an evolving set of principles, practices and experiences that produce movement within an organisation over a period of time. The M&A process in this research is seen as a natural or intentional unfolding of continuous events towards desired outcomes in a specific Southern African hospitality environment exposed to M&A activities (Anderson & Anderson, 2001:137). The concepts M&A change and M&A process are thus used interchangeably when referring to the organisational change phenomenon related to a cross-cultural M&A in this context.

### 1.5.3.3 M&A team coaching programme

Merriam and Brockett (1997:16) are of the opinion that 'programme' is a preferred term in adult education that refers to the total educational offering. The educational offering consists of the content envisioned for a target audience, usually in a particular sequence, and accompanying activities. The M&A team coaching programme pertaining to this research was realised in two distinct, but interrelated stages, namely the **M&A orientation intervention** and the **M&A implementation intervention**. Both programme stages were envisioned to facilitate managers' mental health for sustained performance within a context of company culture integration. The programme was situated within Social Constructionism. The guiding theoretical perspectives were Appreciative Inquiry complemented by the Theory for Health Promotion in nursing.

As mentioned earlier, the programme was the outcome of former research that I conducted in fulfilment of the requirements for the degree Magister Curationis (M.Cur) in psychiatric nursing (Visagie, 2002). It originated from a conceptual framework that served as a structure for theory generation. The original conceptual framework is presented in Chapter three. A conceptual framework is a symbolic depiction of reality providing a schematic representation of relationships among phenomenon by using symbols or diagrams to represent an idea (Brink, 2001:29).

The generation of a worthy programme was envisioned in this research, meaning a programme that has been implemented, valued and refined by various stakeholders, thus meeting the credibility criteria that are described in Chapter two (2.4.3).

#### 1.5.3.4 Company culture integration

A process of company culture integration impacts on value creation and refers to a systematic, well managed integration process that begins “the minute that people from an acquirer and a target come into contact with each other” (Schweiger, 2002:15). It continues long after the M&A deal (Schweiger, 2002:x); in the context of this research it lasted for a period of three years. Significant company culture integration is evident in the value from synergies that are created by integrating two companies (Schweiger, 2002:x). Company culture integration in this research denotes the alignment of managers’ personal values and goals with the core ideology and goals of the acquirer, hence, generating behaviour that reflects sustained performance.

#### 1.5.3.5 Sustained performance

The Encarta English Dictionary (Rooney, 1999:1882) defines the concept ‘**sustain**’ as the ability to manage or to withstand something and continue doing it in spite of challenges. The core meaning of performance stems from the word ‘**perform**’, meaning “to complete a task or duty, especially when this requires skills” (Rooney, 1999:1401–1402). Performance focuses explicitly on a display of cognitive, emotional and social behaviour, namely the manner in which somebody functions in an integrated fashion (Rooney, 1999:1402). Performance oriented behaviour includes productive output, the social processes used to perform tasks and a relational experience that contributes positively to the learning and personal well-being of employees (Hackman & Wageman, 2005:272). ‘Sustained performance’ in this research signified desired execution practices that were consistently displayed by managers in order to enhance **organisational performance** and the financial feasibility of the cross-cultural M&A.

#### 1.5.3.6 Stakeholders

A stakeholder is a “person or group with a direct interest, involvement or investment in something” such as the employees, shareholders or customers of a business (Rooney, 1999:1822). A stakeholder perspective is in line with current organisational thinking that an organisations’ effectiveness is aligned to its ability to maximise stakeholder interest (Anstey, 1999:301). In the context of this research **four stakeholder groups** were identified that represented different research participants, namely the **three stakeholder groups involved in the triangular coaching relationship** (Dembkowski, *et al.* 2006:12) and an **expert stakeholder group** that was engaged in the summative programme valuation.

The stakeholders who formed part of the triangular coaching relationship were a **management team**, **company stakeholders**, the **business team coach and co-coach**. The **management team** consisted of operational or middle managers employed at the hotel in Swaziland. As programme recipients, they represented the key stakeholder group in this research. Operational managers assign and oversee the use of resources and design objectives to implement top-management goals (Plunkett & Attner, 1997:5 & 21). A management team consists of two or more managers who are bound by a common purpose. They set individual and collective objectives aligned to the common purpose and exercise managerial functions like planning, organising, staffing, leading and controlling, as well as using various resources, including information, materials, money and people (Plunkett & Attner, 1997:5, 746). The concept 'manager' is primarily used when reference is made to managers as research participants during the thesis. Managers gave their team a SiSwati name during the M&A orientation intervention, namely the "*Lukwethi-team*" meaning the "*brightest star above*", explaining the use of this concept interchangeably with the concept 'team' from Chapter five onwards.

The **company stakeholders** formed part of the company's executive management team. It included the Chief Executive Officer and the Director of Organisational Development. They both had a direct interest in the programme, as business partners and as a married couple. The Chief Executive Officer is also the company owner and made a substantial financial investment when he acquired the hotel. The Director of Organisational Development directed the ongoing business and team coaching intervention employed by the company. **Indirect company stakeholders** that are worth mentioning based on their influencing role in this context, include the **four General Managers** that worked at the hotel in Swaziland during programme implementation, **Company Directors** that participated in the M&A orientation intervention and the **Director of Business Solutions** who participated in the summative programme valuation.

I fulfilled the role of a **business team coach** in the context. A **co-coach**, also practicing as a business team coach, assisted me during the course of programme implementation. A **business team coach** is the professional person responsible for facilitating a team coaching process. He or she should be "well-trained" and in possession of an accredited coaching qualification (Baanders, 2005:49; Sherman & Freas, 2004:86). The skilled business team coach dealing with organisational change like M&As should, additionally, be an expert in transition, in tune with the process of change, well-skilled in managing change and building and maintaining meaningful relationships (van der Sandt, 2004:27). Business team coaches should display knowledge of the business context and its demands, in this case a Southern African hospitality environment, and



should be viewed by stakeholders in the triangular M&A coaching relationship as being on the same wavelength (van der Sandt, 2004:27). My business team coaching role was complemented by my research role. The terms 'coach' and 'team coach' refer to the 'business team coach' specifically and are used interchangeably within the context of this research because of the concept 'team coaches' are an inclusive term that refers to the coaching partnership that existed between me and the co-coaches. The co-coaches fulfilled the additional role of research fieldworkers.

**Expert stakeholders** refer to the external and internal expert stakeholder groups who participated in the summative programme valuation (Chapter six). The **external expert stakeholder group** consisted of academic, business and coaching partners with an indirect interest in the research because of their roles in social transformation and education. The **internal expert stakeholder group** consisted of stakeholders with a vested interest in the research, namely company stakeholders and the team coaches who co-facilitated the programme in this context.

#### 1.5.3.7 Business coaching, including business team coaching

**Business coaching** is described as a **relationship** between a client who has managerial authority in an organisation and a business coach who uses a wide variety of behavioural techniques and methods **to optimise the clients' personal and professional performance** in order to improve the effectiveness of the organisation (Stober & Grant, 2006:3). Business coaching is in essence about a **relationship** between the client and the coach that results in goal attainment (Dilts, 2003:33; Hargrove, 2004:15). Business coaching can be a one-on-one or a team intervention and is directed by a formally defined coaching agreement.

**Business team coaching** is seen as a **goal-directed, results-oriented process** underpinned by **lifelong learning principles** that transpire in a "**triangular coaching relationship**" (Dembkowski, Eldridge & Hunter, 2006:11; Sherman & Freas, 2004:85). The team coaching process enables personal and collective learning and development to take place, ultimately enhancing organisational performance (Parsloe, 2002:2). The **triangular coaching relationship** should be carefully managed. It refers to three stakeholder groups as mentioned above in the context of this research, namely the **management team, company stakeholders** and the **team coach and co-coach**. The **aim of business team coaching** in the context of this research was **to facilitate managers' mental health for sustained performance in a context of company**

**culture integration.** There is ample evidence that business coaching, including business team coaching, is a management tool that can have a powerful sustainable impact on personal and professional development (Dembkowski, *et al.* 2006:13). The use of the terms ‘team coaching’ and ‘coaching’ refers consistently to business team coaching in the rest of the thesis, with the exception of the recommendation section in Chapter seven which focuses on business coaching in general (7.4).

#### 1.5.3.8 Facilitation

**Facilitation** indicates a **dynamic, interactive process of mental health facilitation** (University of Johannesburg, 2009:7) and **lifelong learning** in the context of this research. The process of facilitation transpired within the triangular coaching relationship primarily between the team coaches and managers. It entailed the creation of a mental health enhancing environment and the mobilisation of managers’ internal and external resources by the team coaches (University of Johannesburg, 2009:7). The identification and bridging of obstacles in the facilitation of mental health was integral to the process (University of Johannesburg, 2009:7). The aim of the facilitation process was to enable managers to discover knowledge they already had, to generate further experiential learning (Rooth, 1995:9), to uncover individual and collective potential and to consider new options that were available to them during the cross-cultural M&A.

#### 1.5.3.9 Valuation

The word ‘**valuation**’ is derived from the concept evaluation. ‘**Valuation**’ refers to a conscious process that I conducted during the three interrelated research phases to obtain relevant stakeholder information pertaining to different aspects of the research process (managers’ experiences of a cross-cultural M&A and stakeholders’ programme experiences). The **aim** was to finally **reach a conclusion regarding the worth of an M&A team coaching programme**. The valuation process was ongoing and it was predominantly embedded within Appreciative Inquiry. It consisted of both **formative** and **summative valuation activities**, including all four stakeholder groups. **Formative valuations**, for example, at the end of each coaching meeting with the managers, were undertaken throughout, and helped to form the remainder of the programme (Bolton, 2001:85). **Summative valuation** was conducted at the end, summing up stakeholders’ experiences of the whole programme. In the context of this research, valuation was imperative to refine the programme continually, improving theory and practice. My decision to use the concept

'valuation' instead of 'evaluation' was based on the Appreciative Inquiry paradigm that compels for a movement towards appreciative language (Crous, 2008).

#### 1.5.4 Methodological Perspective

The beliefs of the researcher concerning the nature and structure of science as a discipline are reflected in the **methodological perspective**, representing the assumptions that guide action in terms of how the researcher gains knowledge about the world (Denzin & Lincoln, 1994:108). These assumptions fit within the overarching interpretive paradigm chosen by the researcher and makes demands on the researcher, including the questions that should be asked and the interpretations that the researcher attach to them (Denzin & Lincoln, 2004:33).

This research was located within a **post-modern worldview** and I selected **Social Constructionism** to represent the methodological perspective. Social Constructionism adopts a **relational ontology**, implying that the mind constructs meaning in its relation to the world thus referring to the collective generation and transmission of meaning during the research process (Gergen, 1999: 60; Patton, 2002: 97). A **subjective epistemology** was further evident based on the co-creation of understandings between research stakeholders guided by a naturalistic set of methodological procedures situated within the natural world. —“The primary emphasis on discourse as the vehicle through which self and world are articulated, and the way in which such discourse functions within social relationships” (Gergen, 1999: 60) urged me to obtain a multi-voiced research account, embedded in the use of a multi-method approach (Nelson *in* Denzin & Lincoln, 2003:11).

Denzin and Lincoln (2000:159) urge the researcher to be sensitive toward the ethical and political implications of chosen methodological paradigms, asking, “How shall I be toward the people I am studying?” In the context of this research it was imperative to demonstrate culture sensitive ways of being. This was practiced through self-reflexivity, especially in terms of a natural tendency to display power and dominance in my role as a researcher. Aware of the pitfalls of these characteristics in my position, I consciously endeavoured to form interactive social partnerships with relevant stakeholders. The socially constructed nature of reality, the intimate relationship between me and what was studied and the situational constraints shaping the inquiry, guided me throughout the research process. In my role as researcher I diligently applied myself to understanding stakeholders' constructions of meaning, because it is these constructions that constitute social realities and underlie human action (Swandt, 1994:118).

I was continuously aware that “inquirer bias, experience, expertise and insight are all part of the meanings constructed and described” (Denzin & Lincoln, 2003:598). As a researcher I needed to refrain from prescribing or advancing any particular set of values (Denzin & Lincoln, 2003:598). Contextual, holistic understanding is the gift of research embedded in Social Constructionism. Denzin and Lincoln (2003:601) contend that the researcher should be responsive to contextual needs for understanding, rather than adherence to any singular philosophy.

These authors are further of the opinion that the focus of an interpretive epistemology is not so much on questions of method as on questions of purpose and role (Denzin & Lincoln, 2003:598). Even though the quality of technique was secondary to the “quality and meaningfulness of understanding”, a procedural structure was followed based on the demand to produce research that portrayed methodological quality and data integrity (Denzin & Lincoln, 2003:599). In line with the **interpretive epistemology** of Social Constructionism the approach to programme valuation was embedded within a hermeneutic view of social scientific knowledge claims, a values orientation that promoted pluralism and a preference for qualitative methods (Denzin & Lincoln, 2003:595). The approach aimed to address the interests and to honour stakeholder’ experiences by giving voice to their contextualised programme understanding.

Additionally, a **functional approach** as described by the Botes model for research in nursing (University of Johannesburg, 2009:9–15) guided the scientific inquiry of this research. The model is based on the conviction that an integrated relationship exists between practice and research. The focus of this research, namely to implement and valuate an existing M&A team coaching programme in a specific context was in line with the criterion of usefulness described within a functional approach.

## **1.6 RESEARCH DESIGN, STRATEGY AND METHOD**

A description of the research design, strategy and methods follows.

### **1.6.1 Research Design And Strategy**

To accomplish the aim of the research a **qualitative evaluative design** that is **theory-generative** in nature was conducted (Babbie & Mouton, 2001:356; Denzin & Lincoln, 2003:590–618; Wadsworth, 1997:5). The research was in essence situated within an ideographic approach. Babbie and Mouton (2001:272) indicate that an ideographic approach “examines a single event or case and its structural coherence with a larger context”, emphasising the contextual nature of

what is studied. This research was unique as it was conducted from a mental health perspective at a time in South Africa when cross-cultural M&As was a reality within different organisational settings, posing a threat to the mental health of those involved.

In order to move from the research paradigm to the empirical world specific strategies of inquiry guided the process (Denzin & Lincoln, 2004:36). An **auto-ethnographic strategy** was used to accomplish this aim (Ellis *in* Denzin & Lincoln, 2003:206). The research design and strategy will be discussed in greater depth in Chapter two.

## 1.6.2 Research Method

Delivering programmes to adults mainly involves making decisions about the need for the programme, its implementation and its impact or outcomes (Rossi, Lipsey & Freeman, 2004:18). This research was divided into three interrelated phases, representing a programme evaluative cycle. The research methods integral to these three phases are briefly reflected below. A dense description of the methodology is described in Chapter two.

### 1.6.2.1 Phase one: Situational analysis to establish programme applicability

The objective of this phase of the research process was to **establish programme applicability**, meaning to **value** if the programme would be relevant for the selected target audience and the particular context. A **management team**, consisting of operational managers, were purposively selected to participate in the research based on sampling criteria (de Vos, *et al.* 2005:202). **Qualitative data** to achieve the objective were generated by means of **naïve sketches** (Giorgi, 1985:1), a **focus group** (Krueger, 1994:6) and **field notes** (Wilson, 1989:434–436; Merriam, 1991:98).

**Tesch's descriptive method of open coding** (Creswell, 1994:154–155) was used to analyse the data. An **independent coder** was included in the data analysis process to enhance trustworthiness. I did not conduct a **literature control** during this phase, because the main objective was to establish programme applicability and not to re-contextualise findings within existing literature. The findings of this phase served as the foundation for Phase two, namely **programme refinement, implementation and valuation**.

### **1.6.2.2 Phase two: Living the refined conceptual framework of an appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance**

The **objectives** of this phase of the research were threefold. Firstly, to **refine the conceptual framework** that guided the generation of the original M&A team coaching programme, followed by a **description of a refined version**, incorporating **programme implementation guidelines** for business team coaches. Programme refinement activities were based on the findings of Phase one. Secondly, to **implement the refined Appreciative M&A team coaching programme** in the Southern African hospitality environment and, thirdly, to explore and describe managers' experiences of programme implementation in order to **conduct ongoing programme valuation and refinement**.

The **key stakeholder group** remained the same, namely a **management team** that had been purposively selected. The **sample** was additionally **emerging** related to the fact that team membership was not stable during the three years that I remained in the field (de Vos, *et al.* 2005:202; Patton, 2002:240). The co-coach and company stakeholders furthermore participated in programme implementation and valuation activities.

The programme was realised in **two distinct, but interrelated, stages** as described in Chapter two (2.4.2). **Multiple data collection methods** were used to achieve the research objectives, including a **focus group, naïve sketches, field notes, descriptive feedback sheets, coaching tools and techniques, document reviews, secondary reports** and a **qualitative individual interview** that was conducted with managers.

**Data analysis** was guided by Tesch's descriptive method of open coding (Creswell, 1994:154–155). **Guidelines for programme implementation** were embedded in the description of how the preliminary refined conceptual framework was lived (Chapter 5). A **literature control** was carried out to re-contextualise the emerging theory in existing literature sources (Morse & Field, 1996:107).

### **1.6.2.3 Phase three: Expert and auto-ethnographic valuation and refinement to establish the worth of an Appreciative M&A team coaching programme**

The **objectives** of the last phase of the research were **to establish programme worth** from an **expert stakeholder group** and **auto-ethnographic perspective** in order to **generate**

**programme refinement recommendations** to improve future programme applicability in a Southern African hospitality environment, representing a cross-cultural M&A context. The **expert stakeholder group** were **purposively selected** based on their experience in diverse, yet complementary organisational fields. A process of **summative expert** and **auto-ethnographic valuation** guided this phase. **Data** were **inductively collected** by means of a **naïve sketch** that consisted of three questions situated within an Appreciative Inquiry framework (Preskill & Catsambas, 2006:35), described in Chapter two (2.4.3).

The **programme experiences** and **recommendations** that I obtained from the expert group, complemented by my own reflections, were considered and **formed the basis of the final programme refinement activities** and **conclusions regarding programme worth**. **Data analysis** was guided by Tesch's descriptive method of open coding (Creswell, 1994:154–155). A **literature control** was conducted to substantiate the findings in existing literature as a next level of establishing programme worth (Morse & Field, 1996:107).

## 1.7 MEASURES TO ENSURE TRUSTWORTHINESS

To ensure trustworthiness, Guba's model (in Krefting, 1991:214–222) of trustworthiness was implemented with reference to strategies of credibility, applicability, dependability and confirmability. These strategies to ensure trustworthiness are described in Chapter two.

## 1.8 ETHICAL CONSIDERATIONS

Internationally agreed upon ethical principles, as stipulated by the Belmont Report (Amdur, 2003:23–31) and Declaration of Helsinki (World Medical Association, 2008:1–5) governed the research process in relation to:

- respect for persons,
- beneficence, including reporting and credibility of the research, and
- justice.

### 1.8.1 Respect For Persons

**Respect for persons** focused primarily on **ensuring participants' rights to self-determination and autonomy in the research process** (Amdur, 2003:25). The participants selected for the research included the previously mentioned four stakeholder groups (1.5.3.6). I personally invited participants to engage in the research without knowledge of “undue influence” from any individual

or organisation (Amdur, 2003:27). **Voluntary participation** was stipulated in the letters of consent, one addressing the participants and the other one requesting permission to conduct research in the acquiring company (Appendices 2 & 3). Voluntary participation was further emphasised during the initial contact sessions with all the stakeholder groups. These one-on-one conversations aimed to invite stakeholders to become partners in the research process, as well as to explain the purpose, background, need for the research and the research process to them. I also explained my institutional affiliations to them with regards to the acquirer specifically.

It was crucial to obtain buy-in from especially the management team as a key stakeholder group, because company policy stipulated that all managers should be in team coaching. These monthly four-hour team-coaching sessions were also used for data collection. Participants were informed that they could **withdraw from the research process at any time without fear of victimisation**.

The **letters of consent** included information as stipulated by the Democratic Nursing Organization of South-Africa (DENOSA, 1998:2.2.3 [Appendices 2 & 3]) in order to ensure **informed consent**. The letters of consent included the following detail, namely (a) title of the research, (b) purpose and objectives of the research, (c) proposed research methods and procedures, (d) way in which results will be utilised, (e) participants' right to terminate their participation without being penalised on physical, emotional, social and/or economic levels, (f) potential advantages of participating in this research and (g) measures that would be applied to ensure confidentiality and anonymity (DENOSA, 1998:2.2.3).

**Measures to ensure privacy and confidentiality** included the **protection of the identity of participants** by destroying the audio tapes after data were transcribed and omitting their names in the research report. (Take note that this measure is not applicable in the current context of social research where it is expected that a researcher should keep data under lock and key for two years after publication of the first article for potential auditing purposes). Reports of coaching meetings were submitted to the participants for **member checking** before it was disseminated to the Director of Organisational Development. This measure aimed to ensure that participants had the opportunity to correct information that they did not approve of. Reporting to the acquirer was an integral part of the team coaching intervention related to the existence of a triangular contract between the management team, company stakeholders and the team coaches. I was fully aware that personal accountability could be challenging in such a dynamic context, but I strove consistently to honour the abovementioned measures, thus displaying **researcher integrity**



(World Medical Association, 2008:2). The **transcriber** of the audio taped data additionally signed a confidentiality clause and provided **informed consent** for the use of her reflections regarding programme worth as described in Chapter two. (Appendix 4).

### 1.8.2 Beneficence

The core meaning of **beneficence** according to Amdur (2003:29) is: “**do unto others as you would have them do to you**”. The research was therefore designed in such a way that psychological, social and financial **risks** for all stakeholders were **minimised** and **potential benefits** such as personal and professional development and growth were **maximised**. I strove to **identify potential discomfort** inherent to the research process when possible, such as psychological discomfort that might arise from self-disclosure during the data collection process, as well as the implementation and valuation of the M&A team coaching programme. This was done by **establishing rapport and prolonged engagement** with the management team in particular, and the honest sharing and clarification of relevant information. Due to the complex nature of the context of the research, **supportive services** were offered. These services included **debriefing sessions** conducted by either me or the co-coach, or external professionals when applicable.

**Quality research** was conducted to foster the **credibility of science** related to the qualifications of the research team and a well-planned research design and methods (World Medical Association, 2008:2). The **professional research team** consisted of **me** in the role of primary researcher and team coach, **two study supervisors** and **two co-coaches** respectively who acted as field workers. I obtained a master's degree in advanced psychiatric nursing science with distinction, prior to this research. I have been actively involved in external research activities since 2003, with more than 30 completed qualitative data analysis projects and three contract research projects. Since 2006 I have presented more than 20 qualitative research workshops for academics and post-graduate candidates in three Higher Education Institutions in South Africa. I additionally obtained an advanced professional business and life coaching qualification in 2005 to gain essential skills and competence in the field of business coaching.

The **supervisors** of this study are both lecturing professors who have supervised more than 200 completed masters and doctoral candidates. They have published more than 100 peer reviewed articles and are both directors of the International Institute for Qualitative Methodology at the University of Alberta, Canada. Both co-coaches obtained post-graduate qualifications in the field

of advanced psychiatric nursing science – one a master's degree and the other a doctoral qualification. The research proposal was approved by the Department of Nursing and the Ethics Committee of the Faculty of Health Sciences, University of Johannesburg (World Medical Association, 2008:2 [Appendix 1]).

**Partial funding**, in the form of a merit bursary and supervisor grant, was made available by the University of Johannesburg. The **quality of research** was further ensured through adherence to high standards of research planning, implementation and reporting. **Conflict of interest** was a relevant **ethical challenge** related to my participatory role in the research and the complex nature of the triangular coaching contract. I attempted to remain **neutral** through the use of **bracketing, reflexivity and disclosing my personal biases, views and experiences** throughout the research report. **Reporting practices** were designed to display integrity by not marginalising certain voices. The **input of participants was acknowledged** throughout the research process, amongst others in the form of direct quotes to provide evidence of findings. At the completion of the research a **summarised version of the research findings** will be made available to them.

### 1.8.3 Justice

**Justice** refers to the **distribution of risk to the society**, implying that the selection of participants should not be biased in terms of classes or types of individuals (Amdur, 2003:30). Participants were **purposively selected** associated with the qualitative nature of the research design. I did not depart on the research journey with the conviction that the participants were a vulnerable population. As the process unfolded ethical challenges emerged that are disclosed in Chapter seven.

## 1.9 CHAPTER SEQUENCE

The chapter sequence of this thesis is as follows:

- Chapter 1: Rationale and overview of the research
- Chapter 2: Research design, strategy and methodology
- Chapter 3: Overview: Guidelines to facilitate an M&A team coaching programme to facilitate managers' mental health
- Chapter 4: Description of the findings of a situational analysis to establish programme applicability (Phase one)

- Chapter 5: Living the refined conceptual framework of an Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance (Phase two)
- Chapter 6: Expert and auto-ethnographic valuation and refinement to establish the worth of an Appreciative M&A team coaching programme (Phase three)
- Chapter 7: Research justification, limitations, conclusions and recommendations

## **1.10 SUMMARY**

The focus of this chapter was to offer you a clear overview of the research. It situated M&As as a relevant organisational change phenomenon within the global and national business landscape. The problem statement reflected multi-faceted M&A realities that form an integral part of the research problem and compelled me to conduct the research. The research aim was to generate a worthy Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance.

The related objectives were to establish programme applicability in the context of the research, to describe a refined Appreciative M&A conceptual framework based on the findings of the first phase and to explore and describe the experiences of managers in order to value and refine the programme. The final worth of the programme was established through summative valuation data that was obtained from an expert stakeholder group, complemented by auto-ethnographic programme valuation. I additionally described the paradigmatic perspective, followed by an overview of the research design, strategy and methods. Finally, I unpacked the ethical principles that governed the research process. Chapter two will provide a detailed description of the operationalisation of the research design, strategy and method.

# Chapter 2

## RESEARCH DESIGN, STRATEGY AND METHOD

*“On the day when the weight deadens on your shoulders and you stumble, may the clay dance to balance you”.*

(John O’Donahue in Haarhoff, 1998:1)

### 2.1 INTRODUCTION

This Chapter sets the stage for the emerging research process by providing a scientific framework thereof. One overall aim guided this research, namely to generate a worthy Appreciative M&A team coaching programme to facilitate managers’ mental health for sustained performance in a Southern African hospitality environment. The aim was achieved through three interrelated research phases. Each of the three phases had a specific focus with specific research questions and objectives aligned to the overall aim. Chapter two departs with an overarching description of the research design and strategy, followed by a description of the research methods as it applied to each phase. The Chapter concludes with a description of the measures that I used to ensure trustworthiness throughout all three the research phases.

The three phases were fluid, complex and unique, at times resisting separation. Altogether they formed a unified whole. There were times I experienced confusion in the designing phase, but many “clay-dancing” moments assisted me to ultimately create order from the perceived chaos. My ultimate objective is a clear, reader-friendly end product. A conceptual map is therefore presented in figure 2.1 to illustrate a concise overview of the design, strategy and methods used in each phase.

### 2.2 RESEARCH AIM AND CONTEXT

Patton (2002:213) is of the opinion that “purpose is the controlling force in research”, implying that decisions about the research design, strategy and method flow logically from the purpose. The overall aim of this research was to generate a worthy Appreciative M&A team coaching programme to facilitate managers’ mental health for sustained performance in a

**Figure 2.1 Conceptual map of the research design, strategy and method**

**Aim:** To generate a worthy Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance in a Southern African Hospitality Environment

**Research design & strategy:** Qualitative evaluative design that is theory-generative in nature, complemented by auto-ethnography

**Phase one: Situational analysis to establish programme applicability**

**Objectives:** Establish programme applicability  
**Invited stakeholders:** Seven managers  
**Data collection:** Focus group, naïve sketch, field notes  
**Analysis:** Tesch's descriptive method of open coding  
**Findings, conclusions and recommendations** informed the second phase

**Phase three: Expert and auto-ethnographic valuation and refinement to establish programme worth**

**Objectives:** Valuate programme worth from an expert stakeholder and auto-ethnographic perspective and generate programme refinement recommendations  
**Invited stakeholders:** External and internal expert stakeholder group; myself related to auto-ethnography  
**Data collection:** Naïve sketch  
**Data analysis:** Tesch's descriptive method of open coding  
**Findings, conclusions and recommendations** gave evidence of the worth of the programme

**Phase two: Living the refined conceptual framework of an Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance**

**Objective:** Describe a refined Appreciative M&A team coaching conceptual framework, followed by programme implementation and valuation

**STAGE ONE**

M&A orientation intervention  
**Invited stakeholders:** Seven managers, co-coach, company stakeholders  
**Data collection:** Naïve sketches, field notes, focus group

**STAGE TWO**

M&A implementation intervention  
**Invited stakeholders:** Seven to 11 Managers, co-coach, company stakeholders  
**Data collection:** Descriptive feedback sheets, coaching tools and techniques, field notes, document reviews, secondary reports, qualitative individual interview

**Analysis:** Tesch's descriptive method of open coding

**Findings, conclusions and recommendations** informed the third phase

Southern African hospitality environment. The Southern African hospitality environment refers to a specific property and hotel owning group who acquired a 104-bed hotel in Swaziland, thus merging two business entities with differences in language, race, culture and history. The environment represented a cross-cultural M&A context that required company culture integration as an integral part of programme realisation. The research objectives are discussed as part of the methods section as it pertains to each of the three research phases (2.4).

## 2.3 RESEARCH DESIGN AND STRATEGY

A well-planned research design maximises the credibility of the findings by providing the researcher with a blueprint guiding the scientific inquiry. Babbie and Mouton (2001:72) mention two major aspects of research design. In the first instance, specify as clearly as possible what you want to find out. Secondly, determine the best way to find it out.

I deemed a **qualitative, evaluative design** that is **theory-generating** in nature as the most appropriate way to provide answers to what I wanted to find out, namely if the existing programme was applicable to the research context and if so, how it could be refined, implemented and valued to generate a worthy programme. The decision was embedded in the nature of the research investigation that allowed for an **inductive, ideographic approach**. **Auto-ethnography** was selected as the research strategy, implying the skills, assumptions and methods that I used for collecting and analysing data as I moved from the research paradigm to the empirical world.

The next section describes the **research design** and **strategy** as it pertains to all three the research phases, followed by a description of the **methods** employed during each phase respectively.

### 2.3.1 Qualitative Evaluative Design, Theory Generating In Nature

Creswell (2007:35) refers metaphorically to **qualitative research** as “an intricate fabric composed of minute threads, many colors, different textures, and various blends of material”. These threads are held together by general worldviews. I agree with his opinion that this fabric eludes easy or simple explanations. Denzin and Lincoln (2000:1) strengthen the argument by referring to the long and sometimes anguished history of qualitative research in the field of human sciences related to resistance against the open-ended nature of qualitative research. It is

this open-ended, creative nature that excites me about qualitative research. The emerging nature of qualitative research implies that new techniques are often invented or old ones pieced together (Denzin & Lincoln, 2003:6).

For the purpose of this research I include Creswell's (2007:37) **definition of qualitative research**: "Qualitative research begins with assumptions, a worldview, the possible use of a theoretical lens, and the study of research problems inquiring into the meaning individuals or groups ascribe to a social or human phenomenon". Qualitative research activities are centred on an "insider perspective on social action" with sensitivity to the context in which participants operate, their frame of reference and history (Babbie & Mouton, 2001:271). Understanding how people make sense of their lives is a top priority situated within an emerging qualitative design. Creswell (2007:37) additionally refers to the use of data analysis methods that are inductive. He suggests a final written report that includes the voices of participants, the reflexivity of the researcher, and a complex description and interpretation of the problem while "it extends the literature or signals a call for action" (Creswell, 2007:37).

**Evaluative research** is related to a social researchers' desire to make a difference in the world. It is probably as old as general social science itself, because it focuses on the consequences of social reform activities (Babbie & Mouton, 2001:334). Therefore, it fits the field of applied social inquiry. The phrase '**qualitative evaluative research**' refers to a process of qualitative programme valuation in this research.

**Programme valuation** in this research is characterised by the clear value dimensions of its knowledge claims, by the political character of its context, and by the anticipated pluralism and multivocality of its stakeholders (Greene *in* Denzin & Lincoln, 2003:590). Babbie and Mouton (2001:334) point out that programme evaluation represents a research purpose rather than a specific research method embedded in the need to judge the impact of social interventions. Wadsworth (1997:iv) describes evaluation simply as a process of assessing the value of things around us, or things that we involve ourselves in, following logic research-based steps.

Patton (*in* Babbie & Mouton, 2001:337) suggests three main purposes of conducting programme evaluation:

- To make value judgments whether a service or a programme is working or not, thus considering the merit or worth of the service or programme at hand.

- To inform and to improve services, policies, programmes and public conversations in specific contexts.
- To generate knowledge.

A mixture of all three these reasons directed me to conduct qualitative evaluative research reflecting a **programme valuation cycle**. The **programme valuation cycle** commenced with a **situational analysis** in the first phase of the research aiming to establish if an existing programme could be applied to the context under study. This intention implied a desire to judge the merit for transferring the programme to the context, in other words, would the programme recipients, namely managers belonging to a management team in particular, benefit from the programme. The question of **programme worth** was addressed in this phase through an exploration of managers' experiences of a cross-cultural M&A and their recommendations for improved M&A implementation practices (Chapter four).

Phase two involved the activities integral to **'living' or enacting this programme** in the research context (Chapter five). This phase involved an integrated process of **programme refinement, implementation and valuation activities** that had a transformative intent, meaning that the programme outcome or destiny was envisaged to make a positive contribution to organisational life. The programme was firstly **refined** based on the findings of phase one, next **implemented** and exposed to ongoing **formative value judgement activities**. It entailed an ongoing exploration of managers' experiences of the programme, complemented by personal programme experiences and views of the company stakeholders and co-coaches regarding programme implementation aspects. This was followed by **summative programme valuation** by these managers to make concluding value judgements on whether the programme had achieved its outcome or destiny.

The cycle ended with a final judgement of programme worth in the form of **summative programme valuation** based on an expert stakeholder and auto-ethnographic perspective (Chapter six). The **summative valuation process** additionally indicated value judgements regarding the worth of the programme, complemented by my own judgement of programme worth. It entailed an exploration of the expert stakeholders' group experiences of the programme and their **refinement recommendations** for future programme applicability, including an exploration of my personal experiences in this regard.



The process of programme valuation was done to **improve stakeholders' understanding** of how the programme worked and how it influenced the mental health of managers in a context of company culture integration (Babbie & Mouton, 2001:337–339). **Generating new knowledge and confirming existing knowledge** were thus central to the valuation approach, implying **theory-generation**.

Another reason for choosing a **qualitative evaluative design** was linked to the ability of qualitative methods for **telling the programme's story** by capturing and communicating stakeholders' tales (Patton, 2002:10). Babbie and Mouton (2001:357) are of the opinion that qualitative programme evaluation is a response to a quest for more responsive and collaborative forms of evaluation research. In essence qualitative programme evaluation shares the basic epistemological and methodological ideologies of qualitative research (Babbie & Mouton, 2001:357; Wadsworth, 1997:25). The evaluative design chosen opened space for me in all three research phases to gather contextual, detailed knowledge and understanding of the research phenomenon embedded in stakeholders' experiences. It allowed me the opportunity to integrate the perspectives, values and knowledge of stakeholders in the valuation process, thus telling first and foremost the story of the programme from an insider perspective and, secondly, describing the programme outcomes (Babbie & Mouton, 2001:357). The participatory nature of the chosen evaluative design allowed for learning to occur on multiple levels. As the programme evolved, all **stakeholders generated new knowledge** and moved to a position of increased autonomy. Lastly, I generated a vast amount of data that was managed in such a way that it presented an audit trail (Babbie & Mouton, 2001:357).

In essence the evaluative design allowed for the valuation of the programme's **conceptual clarity** (Chapters three & five), the **design and implementation** of the programme, including **implementation and valuation strategies** employed (Chapters five & six) and the **future utility** of the programme (Chapter six) (Rossi & Freeman, 1993:5). Babbie and Mouton (2001:366) are of the opinion that conceptual clarity is a basic condition for the success of any intervention, implying that the programme goals, objectives and evaluation criteria should be clearly formulated.

**Implementation monitoring** included process- and outcome-based valuation activities. **Process-based valuation** was situated in the emerging story of the programme and addressed the question of meaning that transpired from the programme. It entailed **formative valuation activities** described as part of the data collection methods pertaining to phase two of the

research process (2.4.2.4). **Outcome-based valuation** focused on the influence of the intervention on changing the behaviour of managers in relation to the intended destiny of the programme (Babbie & Mouton, 2001:348). The concept of **utility** refers to the **overall worth of the programme** suggested by all relevant stakeholder groups' experiences of its credibility as evidenced by the research findings that are reflected in the second and third phase of the research process. The **summative worth** of the programme was obtained in phase three through a mixture of combining inductively obtained information regarding an expert stakeholder group's view of programme worth and criteria of worthiness that I generated from consulting evaluation research and literature sources (Babbie & Mouton, 2001:357–358; Krefting, 1991:214–222; Preskill & Catsambas, 2006:39; Wadsworth, 1997:31–33).

The qualitative evaluative design additionally incorporated aspects of **exploratory, descriptive and contextual research**. Babbie and Mouton (2001:273) link the **exploratory** nature of qualitative research to how the researcher immersed him- or herself in the natural setting, describing events as accurately as possible and ultimately generating theory from second order constructs. The aim of this research was to generate a worthy Appreciative M&A team coaching programme based on different levels of exploration related to the three research phases.

It could be argued that I departed from a **deductive stance** based on the existence of tentative theory in the form of an M&A team coaching programme that I generated during my master's study (Visagie, 2002). The existence of this theory did inform the research questions asked initially, namely whether the programme could be applied to the setting and how it could be implemented, valued and refined to meet the aim of the research. It also provided guidelines for programme implementation in the second phase of the research. Babbie and Mouton (2001:282) state that it is not uncommon for qualitative researchers to formulate broad "conjectures" or "theoretical expectations" on entering the research field.

I believe that **inductive logic still prevailed** as I did not approach stakeholders with deductively derived research hypotheses or from a general perspective assuming that the programme would be applicable to the context. Instead I entered the field in the natural setting, using myself as the key instrument, describing experiences as accurately as possible as they occurred with emphasis on the generation of inductively based new interpretations of first-order description of events (Babbie & Mouton, 2001:273). Wadsworth (1997:47) supports an inductive way of working in research with an evaluation orientation: "...it seems to work better to start with the 'big picture', the open discussion, the let's-listen-to-the-fresh-voice-of-the-(stakeholder group)...". He is of the

opinion that this approach sets aside previous answers given to questions and also puts to one side previously prepared documents that prescribed service practices.

I agree with Wadsworth (1997:47) that researchers actually do know a lot when they commence with this kind of research endeavour. I lay no claims to entering the setting from a value free position. The difference is in how I used the already known. I used bracketing by setting aside, as much as possible, personal knowledge and preconceived ideas about the research phenomenon – the generation of a worthy Appreciative M&A team coaching programme in the context of a cross-cultural M&A, thus placing a fresh perspective of the phenomenon under study (Creswell, 2007:59/60). I also aimed to focus less on my interpretations and more on a description of the experiences of stakeholders during all three phases of the research process, thus applying intuiting (de Vos, 1998:337).

**Descriptive research** means that the qualitative researcher is interested in describing the process, meaning and understanding of data that materialise during a qualitative study (Creswell, 1994:145). A detailed description is therefore presented in the thesis with reference to dialogue regarding stakeholders' beliefs, history and context as it evolved in the three research phases (Babbie & Mouton, 2001:271). The focus of attention in all three phases was on arriving at a dense or thick description of emerging themes and categories related to stakeholders' experiences of the research phenomenon, using their language in an attempt to stay true to the meanings ascribed by them to these experiences (Babbie & Mouton, 2001:272).

Finally, I attempted to study the phenomenon of interest in terms of its immediate **context** (2.2). Babbie and Mouton (2001:272) argue that researchers can only claim to understand events if they understand it against the background of the whole context and how the context confers meaning to the events concerned. Wadsworth (1997:17) agrees by stating the importance of a deep appreciation of the legitimacy of (the stakeholders') viewpoints – feelings, beliefs, ideas, opinions, attitudes, and ways of being. This kind of recognition and respect is borne of direct personal and continuing absorption regarding the stakeholders' situation. It is crucial to be aware of every nuance of stakeholders' lives; how they feel, think and what they say.

The **cross-cultural nature of the context** created in me an awareness of potential relational barriers that might arise between predominantly Swazi managers and myself. I made deliberate attempts to place myself in the shoes of managers in order to understand their experiences, actions, decisions, practices and rituals within the context of their perspectives (Babbie &

Mouton, 2001:271). I consciously **strove** to create **contextual clarity** throughout the thesis by describing **contextual turning points** such as **entering the context**, the **process of contextual engagement** that took place, **contextual learning** that unfolded and how I dealt with **contextual demands**. Contextual clarity can be used as a yardstick to make judgements about the relevance of the methods employed and to permit transferability (Babbie & Mouton, 2001:282). It is needed in research texts to ensure that the reader joins the researcher in the search for meaning (Patton, 2002:65).

The design was additionally **theory-generating** based on the goal-directed nature thereof, namely to confirm and refine previously generated theory, while logically describing emerging theory related to a worthy Appreciative M&A team coaching programme in this research. A **theory** provides a resourceful and rigorous construction of ideas that project a tentative, purposeful, and systematic view of phenomena (Chinn & Kramer, 2008:182). Theory in this research, therefore, represents a systematic explanation of the Appreciative M&A team coaching programme underpinned by clear concept identification and an indication of proposed relationships and predictions (Morse & Field, 1996:3).

The **M&A team coaching programme** that represents the focus of this research presented **theory that needed confirmation** (Morse & Field, 1996:4). A **conceptual framework** – that can be viewed as preceding theory generation – was crafted inductively from the findings of my previous research in relation to managers' experiences of an M&A change process in a similar substantive context (hospitality environment), including their recommendations to address challenges inherent to the change process. The conceptual framework guided the description of context-specific guidelines for advanced psychiatric nurse practitioners to facilitate the programme (Visagie, 2002:8).

**Dickoff, James and Wiedenbach's thinking map** (1968:423) gave structure to the conceptual framework with reference to the agent, recipient, context, motivation of the activity, procedure and outcome. Thereafter, tentative theory generation took place in the form of programme generation based on the following characteristics, namely classifying, categorising, heuristic discovery and explanation (Mouton & Marais, 1994:144). A thorough **literature control** was undertaken in both phases of the research to re-contextualise findings and guidelines in existing literature sources.

**Credibility of theory** is substantiated and confirmed as it is tested and re-tested (Morse & Field, 1996:4). The original M&A team coaching programme was thus exposed to valuation activities by different stakeholder groups in all three the phases of this research to enhance the credibility thereof, thus adding to knowledge advancement in the field of business coaching in particular. The research process additionally followed a logical, interrelated sequence of steps that were mutually inclusive, meaning that theory generation would have been limited in the absence of any one of these research phases that comprised the programme valuation cycle.

### 2.3.2 Auto-Ethnography

Auto-ethnography was selected as a strategy to complement the design. Ellis (in Denzin & Lincoln, 2003:206) points out that **auto-ethnography** starts with the personal life of the researcher, paying attention to feelings, thoughts and emotions in what she calls a “systematic sociological introspection and emotional recall”. The point of attention is to understand a lived experience from the perspective of the researcher. The same author frames this strategy as an “autobiographical genre of writing research that displays multiple layers of consciousness, connecting the personal to the cultural” (Ellis in Denzin & Lincoln, 2003:209).

Auto-ethnographic writing is **evocative, personal, intimate and empathetic** (Ellis & Bochner in Denzin & Lincoln, 2003:216, 244). I therefore adhered to a more personal and intimate first person narration of the research account including my personal feelings and thoughts. I chose this strategy to emphasise that the stakeholders, as well as I, live within the tensions composed by our memories of the past and the expectations of the future (Brochner in Denzin & Lincoln, 2003:220). The research text presents a co-authored multi-voiced account of the experiences of the stakeholders involved in this process.

I used **reflexivity** as a main tool in all three research phases aligned to the personal nature of auto-ethnography. Patton (2002:64) is of the opinion that reflexivity stresses the importance of self-awareness, political or cultural consciousness and ownership of one’s perspective. He sees reflexivity as **self-questioning** and **self-understanding**, thus a process of ongoing examination of “what I know and how I know it”. Being **reflexive** is putting a spotlight on one’s own actions, thoughts and feelings and their effects; being **reflective** is gazing at the whole scenario, taking into consideration aspects such as other people, the situation and context (Bolton, 2001:7).

Ellis and Bochner (*in* Denzin & Lincoln, 2003:211) explain that **reflexive ethnographies** range along a continuum, including research commencing from personally lived experiences, ethnographies where the researcher's experience is actually studied along with those of the participants, progressing to confessional narrations, where the focus of attention is the researcher's experiences of conducting the study. My personal experiences and interactions with stakeholders were deemed important in this research primarily in how it illuminated the culture and lived experiences of stakeholders. Following this approach meant that I shared snippets of my own story where it applied throughout the thesis. My own story as an evolving situated reality will be intertwined with the evolving stories of stakeholders as a way of meaning-making in this journey. This relates to what Cole (*in* Denzin & Lincoln, 2003:244) says regarding the use of stories to try and figure out how to live a meaningful life.

**Reflexivity** was, amongst others, practiced through participation in the **valuation activities**, such as answering the naïve sketch that was presented to the expert stakeholder group in phase three of the research process. Other strategies included **introspection**, **interactive interviewing** and **disclosing personal experiences** and **observations** in reflective letters and the coaching logging reports (Appendices 7.2 & 7.5).

The use of this strategy created certain **personal threats** such as fear of exposure, not having control over how readers would interpret my writing and underlying ethical challenges. These personal threats were fear-provoking at times. They did, however, not stop me from my intentions of being actively engaged in the research process from multiple positions – a researcher, business team coach and person who consciously strove to practice care and concern.

## 2.4 RESEARCH METHOD

Once a design and strategy have been chosen, the focus shifts to the research method. The research was conducted in three interrelated phases, representing a **programme valuative cycle**:

- Situational analysis to establish programme applicability.
- Living the conceptual framework of an Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance.
- Expert and auto-ethnographic valuation and refinement to establish the worth of an Appreciative M&A team coaching programme.

The description of each research phase will commence with the research questions pertaining to the phase, the objectives, population and sampling, sampling criteria and data collection. The role of the researcher – pertaining to all three phases – is discussed in phase one of the research process.

#### **2.4.1 Phase One: Situational Analysis To Establish Programme Applicability**

In the first phase of the research process I aimed, as a **first step of exploring programme worth**, to discover if the previously generated programme could be applied to the specific context and with the key stakeholder group, namely managers who were engaged in a cross-cultural M&A in a Southern African hospitality environment.

The following two **research questions** guided this phase:

- Can the programme be applied to the specific context?
- If so, what recommendations can managers propose for improved M&A implementation practices to enhance programme worth?

Wadsworth (1997:10) is of the opinion that it is crucial to discover the value that people place on events during programme valuation. The **situational analysis** served as an important tool to find out what managers experienced in relation to a cross-cultural M&A; also why and what they would prefer in a programme that focused on mental health facilitation in a context of M&A integration. For me to assume programme applicability would be unscientific and would marginalise the realities of this stakeholder group. An important step was to reach conclusions about their feedback to consider future actions, in this case proposed programme refinements prior to programme implementation.

##### **2.4.1.1 Objective**

The **objective** of the first phase of the research process was to **conduct a situational analysis** to explore and describe managers' experiences of a cross-cultural M&A, as well as their recommendations for improved M&A implementation practices **to establish applicability** of an existing M&A team coaching programme in a Southern African hospitality environment.

### 2.4.1.2 Selection of participants

The participants were selected from a specified population based on a process of purposive sampling (Creswell, 2007:125). A **population** is defined by de Vos, *et al.* (2005:194) as “the totality of persons, events, organisation units, case records or other sampling units with which the research problem is concerned”. A **sample** refers to a subset of the population that are considered for actual inclusion in the research (de Vos, *et al.* 2005:194).

The **specified population** for this phase of the research was **operational managers** who had been engaged in a cross-cultural M&A within the previous three months, situated in the hospitality context with specific reference to a hotel environment. The time span was important based on the findings of my previous research and literature that confirm shifting experiences during the course of M&A processes (Hubbard, 1999:20; Visagie, 2002:84–86).

The **sample** consisted of **operational managers** who formed part of a specific management team, representing the **key stakeholder group**. They were **purposively selected** and **invited** to participate in the research as prospective **programme recipients**. They worked in the hotel in Swaziland which had been acquired three months prior to my first encounter with them by a Southern African property and hotel owning group, representing the Southern African hospitality environment. A **purposive sample** is based on the judgement of the researcher that the selected participants are in possession of particular knowledge and experiences about the issue under study (de Vos, *et al.* 2005:202).

**Replication logic**, described by Yin (1994:45), played a role in their selection, meaning that the managers were chosen based on a prediction that their experiences of the M&A process might correlate with the findings of the two management teams that represented the study unit of my previous research (Visagie, 2002:31). The use of replication logic does not mean that I believe people experience situations in a similar fashion, but rather that I envisioned programme implementation in this research in a setting where it might be needed. I was thus guided by my own knowledge of the population, its elements and the nature of the research aim and objectives (Babbie & Mouton, 2001:166).

The **total sample size** was seven managers between the ages of 29 and 55 in this phase. They met the sampling criteria discussed below (2.4.1.3). Only one female participated in this phase based on the gender composition of the management team. In order to generate dense



descriptions of the relatively small sample size, I used multiple sources of data as a triangulation measure, namely naïve sketches, a focus group and field notes.

#### 2.4.1.3 Sampling criteria

The following characteristics were essential for inclusion in the management stakeholder group based on the notions of replication logic:

- **Occupational status.** Members of the management stakeholder group had to be operational managers that form part of a management team engaged in a cross-cultural M&A for up to three months. It was essential that they had knowledge about the experience and cultural context being studied, thus able to provide answers to the questions asked (Rubin & Rubin, 1995:66).
- **Race.** It was expected that the greater portion of this stakeholder group would be Swazi citizens related to the location of the hotel. People from other racial groups were, however, not excluded from the research in order to portray openness to different cultural beliefs and perceptions that might influence experiences of the research phenomenon.
- **Gender.** Male and female managers were included to assure richness of data that was collected by giving consideration to diverse points of view from a gender-sensitive perspective. This was, however, dependant on the composition of the management team that I did not have control over.
- **Language.** Words are used to shape experiences. English was chosen as the language of choice in order to ensure meaningful participation in the research process. Members who belong to the management stakeholder group should be able to understand and speak English, related not only to the language capabilities of the managers, but of myself and the fieldworkers (co-coaches) that assisted me in the field.
- **Voluntary participation.** The last criterion involved voluntary participation and informed consent based on ethical considerations.

#### 2.4.1.4 Role of the researcher

The role of the researcher as a **primary research instrument** is crucial in qualitative research (Creswell, 2007:38). Qualitative researchers examine personal and community issues. They draw upon their own experiences as a resource when engaged in social inquiries. They think reflexively, historically and wholistically and seek research strategies that will allow them to make connections among lived experiences, larger social and cultural structures and the here and now.

The following section describes how I actualised my role as a “key instrument” throughout all three the phases of the research process (Creswell, 2007:38). Role fulfilment was intrinsically linked to a set of research practices that were consciously chosen to ensure that the aim of the research was met while staying true to the paradigmatic perspective.

As a researcher I situated myself in a **non-expert role** by acknowledging the voices of the stakeholders as a crucial component in constructing knowledge in this context. **Knowledge** was not seen as a product that was presented by an expert to the unknowing (Rooth, 1995:9), but rather a **product of meaning making** between the different stakeholders, in essence reflecting transformation in expressing the authentic self. I entered the research field with optimism, convinced that I would be able to **encourage stakeholders** - particularly managers as the primary programme recipients - **to express their voice**, especially those voices that might have been silenced for specific reasons. Covey (2004:5) describes the power of assisting people to express their voice as follows: “It stands in stark contrast to the pain and frustration I’ve been describing (of a voiceless state) ... It is the voice of the human spirit – full of hope and intelligence, resilient by nature, boundless in its potential to serve the common good. This voice also encompasses the soul of organizations that will survive, thrive and profoundly impact the future of the world”.

As a researcher I do not claim in any way that I ultimately gave managers a voice. That would be to disregard their natural strengths and talents in finding their own voices. It would also oppose the concept of wholism - marginalising the influence of other social and cultural factors. My role was rather to **actively immerse** myself in the setting, to **open up space for conversations, reflections and applying conversational skills** to facilitate managers’ ability to express their authentic selves. It was, furthermore, to **enrol managers in their own knowledge** by being sensitive in maximising opportunities for collecting and producing meaningful information during the data collection and analysis process (Naudé & Muller, 1996:28).

Displaying **contextual intelligence** was of the utmost importance in this dynamic context, which was alive with political and power implications. The reality of a **triangular coaching relationship** between three stakeholder groups, namely a management team, company stakeholders and the co-coach and myself had unique challenges that are described in more depth in the findings sections (Chapters four, five and six). Price and Kruger (2006:1) describe **contextual intelligence** in a corporate domain as a particular form of wisdom that manifests itself in the

person's ability to understand the priorities and viable actions of a particular business event. I therefore had to be sensitive to the physical setting, the people, their behaviour and conversations, as well as information that were gathered (Merriam, 1991:38).

As mentioned in section 2.3.1, I used **bracketing** in an attempt to suspend my knowledge and preconceived ideas about the context and the research phenomenon (Streubert & Carpenter, 1995:457). I did this predominantly through the practice of **reflexivity** – setting time aside for thinking about the value of what was happening in the context, reporting not only the research story and the plot, but also my reactions to it (Holloway & Freshwater, 2007:87). I actively **immersed** myself in the context, the research process and my relationship with stakeholders by focusing my awareness and energy on their lived experiences, thus applying **intuiting** (de Vos, 1998:337). I realised that it was of the utmost importance to grow in my ability to evaluate myself, displaying increased self-awareness, as well as to open myself for feedback from different sources. I did not enter the context with a perfect set of researcher skills and competencies; it was rather a case of studying these skills in order to practice them consciously. Creswell (1994:147) states that qualitative research is interpretative in nature and therefore **my assumptions, values and judgments** are stated explicitly in Chapter one. This serves as a benchmark to evaluate my research practices throughout the thesis.

Naudé and Muller (1996:29) indicate the importance of **how the researcher is viewed by the participants**. Where the researcher is seen as a stranger or intruder, the outcome of the study may be affected. For this reason I remained in the setting for a period of three years, implying **prolonged engagement**. In **Phase one** I acted predominantly as a researcher. On entering the field I was accompanied by Annie Temane, a **fieldworker** who, as an African woman, had a greater understanding of the African culture. (Annie provided informed consent for disclosing her identity). This decision was based on the rationale that managers might more easily relate to a research team with which they could identify, thus opening space for establishing a relationship of trust between them and us (Annie and myself). I believe that **a relationship of mutual trust** is at the heart of qualitative research. Schurink (*in* de Vos, 1998:303) additionally describes mutual trust as an important aspect to ensure the cooperation of participants, as well as to improve the quality of collected data.

In **Phase two** I moved into the **dual role of researcher and team coach** related to the implementation and valuation of the M&A team coaching programme. For 18 months respectively, **two field workers**, Annie Temane and Jeanette Maritz, assisted me. Each fulfilled

the dual role of research fieldworker and co-coach simultaneously. (Jeanette additionally provided informed consent for disclosing her identity in the thesis). The **roles of the researcher and field workers** depend on the research method that is used (Naudé & Muller, 1996:29), as well as the objectives and outcomes of each contact meeting. Gathering multiple sources of data in all phases of the research process necessitated a **team relationship** between the field workers and myself. I prepared the field workers and provided them with needed information regarding the aim and objectives of the research, field assignments and specific tasks (Yin, 1994:59–61). This was done during informal conversations, based on a relationship of equality, acknowledging their skills as researchers and business partners. **Reflective practices** between us were an integral part of our relationship and added to the advancement of my own self-reflexivity. Reflective practices emerged as a way of expressing and exploring our own and others' stories. Stories are data banks representing skill, knowledge and experience. Engaging in reflective conversations enabled the development of practice, whether it was research or coaching in this context, because the outcomes of reflection was purposefully taken back into practice (Bolton, 2003:13).

As a **research team** the field workers and I, had to practice the **art of hearing data and establishing rapport** (Rubin & Rubin, 1995:2). Empathy and trust are the foundation of rapport (Naudé & Muller, 1996:28). It implied the creation of an atmosphere that encouraged **freedom of expression** by portraying a non-judgmental and respectful attitude, which is based on the notion that all participants have dignity and equal worth. Holloway and Freshwater (2007:148) refer to **empathy** as the ability to portray an 'I–Thou' approach to a relationship based on equality and relating to participants more completely. **Facilitation skills** formed the basis of empathy in this setting. Facilitation is not merely a technique for leading a group; it entails a system of beliefs and attitudes that are an integral part of the research. **Facilitation** in this context refers to the non-directive art of creating space for participation in the research process by using the following facilitation strategies:

- **Time management.** The researcher and field workers were the timekeepers that ensured that activities and sharing were completed in the allocated time.
- **Ensure a non-threatening environment.** The researcher and field workers strove to display an attitude of genuineness, friendliness, giving positive affirmation, avoiding competing with different stakeholders and ensuring that the physical environment was warm and encouraging.

- **Encourage democracy.** Sensitivity was demonstrated in terms of refraining to push managers in particular into situations in which they were not willing to participate, and methods and skills applied were non-sexist, non-racial, non-violent and non-coercive (Rooth, 1995:9–14).
- **Asking generative questions.** Yin (1994:56) declares: “research is about questions and not necessarily about answers.” A generative question is one that elicits sharing from the heart, and stirring transformation by just thinking about a possible answer.
- **Being a good listener.** This was demonstrated by **minimal verbal responses** - which is seen as attentive listening - and asking relevant, timely questions (de Vos, et al.2005:289), as well as by utilising silence that may prompt “additional points of view or agreement with the previously mentioned position” (Krueger, 1994:116). As Arthur Frank (2003) states: “The greatest gift you can give someone is your unqualified attention, namely to listen.” It also included the ability to listen to myself (Holloway & Freshwater, 2007:152).
- **Reflecting meaning and feeling.** Reflecting refers to **repeating the underlying cognitive and affective messages** expressed by stakeholders, verbally or non-verbally, in a supportive manner, to assure them that the researcher has correctly understood the message, and to show empathy to their stories by both listening to the stories and attempting to understand it (de Vos, et al. 2005:289).
- **Probing.** This facilitative communication technique refers to the researcher’s ability to **identify and explore experiences, behaviours and feelings** that will assist the stakeholder to engage more constructively in the other steps of communication (de Vos, et al. 2005:70). Typically probing involves comments such as, “Would you explain further?”; “Who else has some thoughts about this?”; “Would you give me an example of what you mean?”
- **Summarising.** **Tying together the different views and feelings** at the end of interviews into one single statement by focusing on essential cognitive and affective themes that emerged, was used to enhance the feeling of progress in communication as well as to create a sense of movement in exploring ideas and findings (Okun & Kantrowitz, 2008:78).
- **Clarifying.** Asking for clarification to bring vague information into sharper focus was one way of promoting mutual understanding between those involved in this research (Okun & Kantrowitz, 2008:77).
- **Adaptability and flexibility.** Being adjustable and flexible are identified by Yin (1994:56) as desired skills to have when conducting qualitative research, as it seldom ends up exactly as planned. **Adaptability and flexibility** should be balanced with rigor to ensure that there

are no unknown gaps and biases (Yin, 1994:56), therefore the need for measures to establish trustworthiness in this research (2.4.4).

#### 2.4.1.5 Data collection

This research relied on **multiple sources of evidence** that were guided by the theoretical propositions described in Chapter one (Yin, 1994:13). **Data triangulation** had the benefit to facilitate the generation of a deeper understanding of the research phenomenon in each phase, because the different interconnected methods complemented each other and shortcomings were in a way balanced out (Mouton, 1996:156). A chain of evidence was created by focusing on the questions asked, data that were collected and conclusions that were drawn (Yin, 1994:36).

Data were collected by means of **naïve sketches**, a **focus group** and **field notes** in the first phase of the research. Each of these methods is described individually after an **explanation of how access into the field was negotiated**, followed by the **data** collection strategy that mainly aimed at building rapport with managers, as well as with the General Manager at the hotel as an indirect stakeholder.

##### a) **Negotiating access into the field**

Entering the context was **negotiated** through the **Director of Organisational Development** as mentioned previously. A next level of gaining entry into the context was to **establish contact with the General Manager** to request his assistance with the proposed research and to schedule a meeting with him at the site. The purpose of the meeting was to ensure his buy-in regarding the research process. His assistance was of cardinal importance because it was proposed that the research should be conducted during working hours. It entailed that managers would be unavailable for operational matters for a certain time period during the data collection process initially. It was further envisioned that managers would participate in monthly four-hour M&A team coaching meetings if the programme proved to be applicable in this context, thus requiring more working time to participate in the programme. Certain logistics thus needed to be sorted out to prevent unhealthy resistance towards conducting the research at this site.

## b) **Data collection strategy**

The following actions were taken to execute the data collection strategy:

- **Select a field worker to assist in the data collection process.** Selection was based on the **cultural fit of the field worker** within the context, as well as on **relevant research experience** of the field worker and the **potential of a collaborative working relationship** between us. The field worker, Annie Temane, was an African woman with a master's degree in Psychiatric Nursing Science (hereafter she will be referred to as 'Annie'). She fulfilled an observational and technical role during data collection. In the second phase she fulfilled the dual role of field worker and team coach. In phase two, Jeanette Maritz joined the company as an internal team coach (hereafter she will be referred to as 'Jeanette'). Her selection as a field worker and team coach was based on her position in the company and matching skills set to assist with research and coaching activities. She obtained a doctoral degree in Psychiatric Nursing Science with team coaching as the focus area in 2006.
- **Determine what will be done at the site during the data collection process.** The data collection process commenced with an **informal meeting** with the managers to start the joining process. Part of this meeting entailed narrating the story of the previous research (Visagie, 2002) conducted within the same Southern African hospitality environment. Providing participants with necessary information regarding the background and purpose of the current research, as well as possible implications of their involvement were seen as an essential measure to foster a relationship of collaboration on entering the field. Next, managers were invited to join the research process and consent was obtained for participation.
- **The venue was prepared before** commencement of data collection with chairs in a circular fashion to facilitate conversation between all present. Audiotape equipment was within easy reach of the field worker (Morgan, 1998:123).

## c) **Self-reporting data collection methods**

Self-reporting data collection methods entailed the use of **naïve sketches**, a **focus group** and **field notes** to gain a deeper understanding of managers' experiences of the research phenomenon related to in this phase of the research process.

### c.i) Naïve sketches

Managers who met the selection criteria were first requested to complete a naïve sketch; thereafter they participated in a focus group. Naïve sketches, as a self-reporting method of data collection, was developed in a **phenomenological orientation** and involves **returning to things themselves** in real life situations (Giorgi, 1985:4, 8). It is a **frank description** such as an essay, a short story or notes (Giorgi, 1985:9). Since I was researching the phenomenon of a cross-cultural M&A to establish programme applicability, I was interested in obtaining descriptions of how managers experienced the event in this context, as well as what their recommendations were for improved M&A implementation practices. Appendix 5.1 contains completed naïve sketches that form part of the audit trail.

Questions that were included in the naïve sketch are given below:

- What was your experience of all the changes so far in the company?
- What recommendations do you have to address challenges related to the change process?

Giorgi (1985:3) is clear about the fact that the primary issue is not so much the fruitfulness of the descriptions, but rather what one does after the descriptions have been obtained. He suggests that “what one has to do is to go beyond the description” (Giorgi, 1985:4), implying interpretation of what was seen, heard and read (Creswell, 2007:39). The method of data analysis is described in 2.4.1.6.

### c.ii) Focus group

A focus group followed as a second self-reporting data collection method employed during the first phase of the research. It similarly aimed to gain a deeper understanding of managers' experiences of a cross-cultural M&A and their recommendations for improved M&A implementation practices. According to Krueger (1994:6) a focus group “is a carefully planned discussion designed to obtain perceptions on a defined area of interest in a permissive, non-threatening environment”. A focus group is a collectivistic rather than an individualistic research method (Madriz *in* Denzin & Lincoln, 2000:836), thus fitting the meta-theoretical perspective of this research, namely Social Constructionism.

The rationale for using a focus group during this phase of the research process was based on the value of focus groups for **creating dense descriptions** of the research phenomenon. De Vos,



et al. (2005:300) state that the purpose of focus groups is to promote self-disclosure. It is a useful data collection method to try and understand diversity, since it can assist the researcher to understand the variety of others' experiences (de Vos, et al. 2005:301). It was therefore a **useful method to compare managers' experiences** of the cross-cultural M&A with the findings of my previous research in order to establish programme applicability. My intention with the focus group was to understand managers' experiences of the research phenomenon; not to generalise but to provide insight into how they perceive the current situation of the cross-cultural M&A, thus not making assumptions about their experiences.

Focus groups have the added advantage of **gathering large amounts of information** in a limited time based on the collective human interaction. The need for speedy M&A implementation to ensure integration was confirmed by the findings of my previous research (Visagie, 2002:84–86). **Effective time management** was a crucial factor in this phase that additionally supports the use of a focus group. The focus group was conducted two months after the official takeover (February 2003), followed by the first phase of programme implementation within three months after the takeover (March 2003). M&A change was portrayed in my previous research as a process that often creates anomie, resulting in a culture of individualism and separation (Visagie, 2002:7). It was thus **advisable to use multiple voices** in a group situation to legitimise the experiences of managers with those of others in order to move the research agenda in the direction of togetherness (Madriz in Denzin & Lincoln, 2000:841).

The **focus group was conducted at the hotel** in response to the warning posed by Madriz (in Denzin & Lincoln, 2000:836) that focus groups may result in a narrowed range of behavioural information if facilitated outside the settings where social interaction typically occurs. Authenticity in sharing was also recognised as a potential threat based on the presence of a facilitator (myself) and co-facilitator (Annie) in the room (Madriz in Denzin & Lincoln, 2000:836). I tried to overcome this threat by building rapport with managers before conducting the focus group, thus complying with the data collection strategy described above (2.4.1.5 a.i).

After a brief account of the findings of my previous research was shared with managers, I asked the following two questions related to the objective to conduct a situational analysis in order to establish programme applicability:

- What is similar about the change process in this setting?
- What is different about the change process in this setting?

Refer to appendix 5.2 for an excerpt of this focus group.

### c.iii) **Field notes**

One of the most distinctive characteristics of qualitative research is its emphasis on interpretation and placing the researcher in the field to observe the activities of participants (Stake, 1995:8). It is, therefore, essential that the researcher “records objectively what is happening but simultaneously examines its meaning and redirects observations to refine or substantiate those meanings” (Stake, 1995:8/9). **Field notes** assisted me to remember and explore the process of data collection, as well as observations made in the hotel setting. These notes included **contemporary field notes** that were **made during and after contact meetings** with managers and during and after data collection procedures to describe underlying themes and dynamics amongst others. It also included **retrospective field notes**.

**Retrospective field notes** reflect events from the past as interpreted by the current position of the researcher (Ellis *in* Denzin & Lincoln, 2003:230). When field notes are written close to contact with participants, it is easy to access lived emotions. On the other hand, being emotionally involved with the scene may create interpretational challenges. Ellis (*in* Denzin & Lincoln, 2003:230) thus suggests the use of **contemporary and retrospective field note processes** as a way of “moving in and out” of events in order to produce an effective auto-ethnography.

**Retrospective field notes** entailed a process of “emotional recall” in which I imagined being back in the scene emotionally, physically and spiritually (Ellis *in* Denzin & Lincoln, 2003:230). I used as many sensory modalities (visual, auditory, kinaesthetic and olfactory) as possible to re-experience and describe the particular event.

I used **observational, theoretical, methodological** and **personal field notes** in this research. **Observational field notes** contain the who, what, when, where and how of human activity that is experienced through watching and listening (Wilson, 1989:434). Thus, observational notes give an account of what happened during contact meetings with little or no interpretation (de Vos, 1998:258). In this research observational notes included a description of the initial face-to-face contact meeting with managers, as well as the consequent data collection meetings (naïve sketch and focus group) with reference to the number of managers involved, the setting and the way in which the meetings were conducted, as well as the process and dynamics during

meetings (Merriam, 1991:98). Historical perspectives regarding the cross-cultural M&A were captured through field notes, as well as informal interactions and non-occurrences (Patton, 2002:301–302). Another important source of information captured by field notes included a description of the internal (vision, mission, core ideology, culture and resources) and external organisational environment (physical, social and spiritual dimensions).

**Theoretical field notes** are described by de Vos (1998:259) as “self-conscious, systematic attempts by the researcher to derive meaning from some or all of the observational notes.” In this research I identified patterns or themes that were repeatedly found in the course of the research by interpreting and inferring, as well as through developing new concepts and linking it to older ones, or relating observations to any other observations (De Vos, 1998:259).

**Methodological notes** are instructions to oneself, critique of one’s own tactics and reminders about methodological approaches that might be fruitful (Wilson, 1989:435). In this research I strove to display sensitivity to my own conduct, as well as the conduct of the field workers throughout the research process and I evaluated our research practices against the selected research design and method.

**Personal notes** refer to reflective notes about the researcher’s personal experiences such as suppositions, feelings, reactions, challenges, ideas, intuition and biases (Creswell, 1994:152). The Encarta World English dictionary (Rooney, 1999:1578) defines reflection as an attentive thought process of reconsidering previous actions, events and decisions. Reflection further denotes a return to previous thoughts as a way of evaluating the self. During the course of this research I consciously practiced self-evaluation by displaying a reflexive stance. Being reflexive implied that I acknowledged and recorded my own inner dialogue (McNamee & Gergen, 1994:17). The reflective conversations I had with the field worker prior, during and after field work in this research phase were important sources of guided self-reflective data, meaning that the content and dynamics of these conversations stimulated self-reflexivity.

Appendix 5.3 contains samples of methodological notes and observational notes obtained during the data collection process.

#### 2.4.1.6 Data analysis

The **aim of qualitative data analysis** in this research was to provide a rigorous and detailed narration of the research account depicted in the vast amount of qualitative data that I gathered throughout the research process to create understanding of stakeholders' experiences. With qualitative data, I refer to all written texts representing the research account. It included the focus group transcript; completed naïve sketches and field notes in phase one. In line with the sociological tradition, all texts were treated as if they represented a window into human experience (Tesch *in* Denzin & Lincoln, 2003:259). The ultimate goal was "to treat evidence fairly to produce compelling analytical conclusions" (Yin, 1994:103).

**Tesch's descriptive method of open coding** (Creswell, 1994:154–155) was chosen as an appropriate inductive method of data analysis in this research. The choice were based on the research interest, namely to discover themes and concepts that are embedded in the multiple sources of evidence, as well as to establishment their connections in order to weave it together into a larger, consolidated picture (Babbie & Mouton, 2001:498). This method of data analysis entails a combination of open, axial and selective coding. Asking questions and making comparisons are basic elements of this process (Babbie & Mouton, 2001:499).

**Open coding** refers to the creation of particular categories pertaining to segments of the text that reflect a single theme (Babbie & Mouton, 2001:499). **Axial coding** involves putting the data back in new ways after open coding, by making connections between categories (Babbie & Mouton, 2001:500). **Selective coding** is the process of systematically selecting a core category and relating it to other categories, validating the relationships and filling in categories that need further refinement and development (Babbie & Mouton, 2001:500). The key of selective coding is thus to find the central storyline.

The following steps of **Tesch's descriptive method of open coding**, adapted from Creswell (1994:154–155), guided data analysis throughout the research process:

1. To get a sense of the storyline, I carefully read through all the transcripts, field notes and naïve sketches (selective coding).
2. I selected one text, the most interesting or shortest, read it carefully and asked: "What is this about?" (Selective coding).
3. At the same time I commenced coding the text by reading paragraphs line by line, asking: "What is the main idea of this paragraph?" I Focused on the underlying meaning of the

text and depicted what was *not* said in order to identify underlying cultural assumptions (Price in Denzin & Lincoln, 2003:281). Next, key phrases were underlined and I jotted down my thoughts in the margin. This process was followed with all generated texts.

4. A list of themes, clustering similar topics together, was generated. These themes were categorised into central themes, unique themes and leftover themes, and implied making comparisons and contrasts (axial coding).
5. This list was used as a frame of reference to revisit all texts in order to group interrelated themes together, thus following a next level of comparing and contrasting themes with each other and the whole (axial coding).
6. These themes were categorised in major themes and sub-themes that supported the central story line. Each major theme and sub-theme was labelled with the most descriptive word or phrase (open, descriptive coding).
7. To show interrelationships between categories that present the main themes and related themes, lines were drawn between them.
8. A final decision was made about naming each category. Categories were then organised in a logical fashion related to the central storyline.
9. Data were recoded if necessary to see whether new themes and sub-themes emerged from this preliminary organising scheme.
10. Segments of text in the form of verbatim quotes from stakeholders' inputs were used as evidence to support findings.

I did not conduct a literature control to re-contextualise data in existing literature in phase one (Morse & Field, 1996:106/107). This decision was based on the fact that an extensive literature control was conducted as part of my previous research to re-contextualise findings in existing literature (Visagie, 2002:54–133) [Additionally see Chapter three].

An **independent co-coder** who obtained a doctoral degree in Psychiatric Nursing Science was involved in the data analysis process to “maintain a chain of evidence” (Yin, 1994:98). The co-coder was knowledgeable in the use of Tesch’s descriptive method of open coding (Creswell, 1994:154–155) and qualitative research methods. Consensus discussions between the co-coder and myself formed part of the inductive data analysis process in order to compare the respective analysis and to reach agreement on the final major and sub-themes depicted by triangulated data sources.

#### 2.4.1.7 Data management

The completed naïve sketches, focus group transcript, field notes and used audiotapes were meticulously filed and kept under lock and key in a marked file that was created specifically for data storage during this phase of the research. Merriam (1991:186) compels for data that are logically organised into a comprehensive, primary resource package. Data should be stored in a systematic way to serve as an audit trail. The coding process commenced simultaneously with data collection throughout all three the research phases.

#### 2.4.2 Phase Two: Living The Refined Conceptual Framework Of An Appreciative M&A Team Coaching Programme To Facilitate Managers' Mental Health For Sustained Performance

I aimed to **refine the previously generated programme** in phase two, **followed by implementation and valuation activities** pertaining to the enactment of the programme (Chapter five). The **integrated refinement, implementation and valuation process** represented a second step to discover programme worth. The components of this process should not be seen in a linear fashion even though it is presented linearly in the description to follow in order to provide a theoretical framework.

I was aware that the research plan could significantly change if the programme was not deemed applicable in the context, as evidenced by M&A experiences that opposed the findings of my previous research. The existence of an emerging research design was hence a reality that created inner tension in me at times, resulting in “what if?” questions. My engagement in the previous M&A process in this setting, as well as my working part-time for a Higher Education institution that merged during the time that I entered the field, gave me the courage to plan the second phase of the research process as described below.

##### 2.4.2.1 Objectives

**Describe a refined conceptual framework** of an Appreciative M&A team coaching programme to facilitate managers mental health for sustained performance in a Southern African hospitality environment, incorporating **programme implementation guidelines** for business coaches based on the findings of phase one and **implement** the programme (Chapter five). A second

objective was to **explore** and **describe the experiences of managers of programme implementation** in order to **valuate** and **refine** the programme (Chapter five).

#### **2.4.2.2 Programme composition and research questions**

The programme consisted of two interrelated stages that formed one integrated whole. **Stage one** entailed the **implementation** of the refined **M&A orientation intervention** with the envisioned intent to include managers in strategic planning through an M&A team coaching intervention embedded in Appreciative Inquiry as a first step in company culture integration. The valuation component was guided by two **research questions** focusing on the **M&A orientation intervention**, namely:

- What are managers' experiences of an M&A orientation intervention?
- What are their recommendations to refine the programme?

**Stage two** involved the implementation of an **M&A implementation intervention** through ongoing team coaching. The outcome was envisioned as managers that were sufficiently integrated into the company culture, living the core company ideology and sustaining performance from a position of internalised mental health behaviours. The underlying proposition of both stages was that mental health is a prerequisite for sustained performance and should therefore actively be facilitated through the implementation of this programme. Both formative and summative valuation activities were informed by the following three research questions addressing the **M&A implementation intervention**, namely:

- What are managers' experiences of an Appreciative M&A team coaching programme to facilitate their mental health for sustained performance?
- How does the programme facilitate managers' mental health for sustained performance within a context of company culture integration?
- What are managers' recommendations for continued programme refinement?

#### **2.4.2.3 Population and sampling**

The specified population is similar to the description in 2.4.1.2. The **seven managers** that formed part of a **management team** and who were involved in the situational analysis were **purposively selected** to participate in both stages of programme implementation based on the

sampling criteria described in 2.4.1.3. All seven managers participated in the **first stage** of programme implementation.

An unpredicted reality in the **second stage** of programme implementation emerged as internal changes in the structure of the management team related to factors such as an organisational restructuring process within the first year of the acquisition and natural employment patterns. **Emerging sampling** was consequently practiced, meaning that changes to the sample size were accepted after field work had begun (Patton, 2002:240). The **total sample** size differentiated **between seven and eleven managers**.

The **co-coach** was another important stakeholder related to her position as the secondary programme agent and field worker. A **triangular coaching contract** represented the interactions between the primary programme recipient (management team), the secondary programme recipient (company stakeholders) and the programme agents, including either Annie or Jeanette and myself at different stages of programme implementation. **Sampling criteria** related to the co-coaches included cultural fit, knowledge and expertise regarding qualitative research and coaching respectively. The co-coaches were involved in programme implementation and formative valuation activities throughout the intervention.

The **company stakeholders** that formed part of the triangular coaching relationship included the Director of Organisational Behaviour and the Chief Executive Officer of the company. Their inclusion met the criteria of convenience sampling based on the fact that they invited me to implement the programme in the company (Brink, 2001:140). They were readily available and willing to participate in this research.

#### **2.4.2.4 Data collection**

**Triangulated data collection activities** focused predominantly on acquiring valuation information from the different stakeholders based on their experiences of the implemented programme and the outcome thereof, firmly embedded in a process of programme engagement. I was seeking dense data that would provide a descriptive portrayal of the research phenomenon, an Appreciative M&A team coaching programme in a context of a cross-cultural M&A, during this phase of the research process.



**Formative valuation data** were collected as reflected below in relation to the two integrated programme stages.

**a) Stage one: M&A orientation intervention**

Data was collected by means of **naïve sketches**, a **focus group** conducted on the last day of the orientation intervention and **field notes**.

**a.i) Naïve sketches**

Managers were requested to complete a **concluding naïve sketch** to generate self-reporting and guided reflective feedback about their experiences of the M&A orientation programme of each consecutive day. This data collection method was used to **collect valuation data** during the first four days of the programme. The open ended statements were structured within an **Appreciative Inquiry framework**, focusing on programme elements that were perceived as working, as well as those elements that were perceived as challenging (Preskill & Coghlan, 2003:5). The managers were requested to envision what they would have liked more of in future team coaching sessions (question three). The naïve sketch concluded with a comments section to allow managers to volunteer information that I have not addressed (Wadsworth, 1997:67). The following open ended statements guided data collection:

- The best part of this day was...
- The least enjoyable part of this day was...
- For future team coaching sessions I need...
- Comments.

Appendix 6.1 contains a sample of one completed naïve sketch for each of the four consecutive days that managers participated in the M&A orientation intervention. Note that identifying data were removed.

**a.ii) Focus group**

Annie and I concluded the M&A orientation intervention by inviting managers to participate in a **focus group** to gain a deeper understanding of their experiences of the M&A orientation intervention and to obtain **formative valuation data** needed for programme refinement.

The questions asked were aligned to those asked in the naïve sketches, namely:

- What have you experienced as the best part of this programme?
- What have you experienced as less effective in this programme?
- What recommendations do you have for programme improvement?

I acted as the primary focus group facilitator, while Annie acted as the co-facilitator and field worker.

### **a.iii) Field notes**

Field notes were predominantly used as **reflexive and observational methods** during this stage of programme implementation. In a sense it meant following the advice of Halcolm (*in* Patton, 2002:259): “Enter into the world. Observe and wonder. Experience and reflect. To understand a world you must become a part of that world while at the same time remaining separate, a part of and apart from. Go then, and return to tell me what you have seen and heard, what you have learnt, and what you have come to understand.”

As a researcher, positioning myself in an auto-ethnographic stance, I paid attention to what I saw and heard to record reflective notes in writing. I reported on the strengths and challenges of my own perspective and the way that I practiced the art and science of programme implementation. Triangulation of personal reflections and observations with the other data sources were done as a measure of validation (Patton, 2002:262).

Field notes included **observational, theoretical, methodological and reflective notes** as previously discussed. The field worker played an important role in note taking. Notes were again taken during and after contact meetings with the stakeholders that were engaged in programme implementation (managers, company stakeholders, co-coach). Refer to appendix 6.2 for a sample of field notes pertaining to this stage of programme implementation.

### **b) Stage two: M&A implementation intervention**

Stage two entailed the **implementation of an M&A implementation intervention** through an ongoing process of Appreciative M&A team coaching. The data collection process was pragmatic, aiming to achieve **dense descriptive valuation data** of stakeholders’ programme experiences, including an **auto-ethnographic account** of my personal engagement in the

programme as a researcher and a team coach. The Appreciative M&A team coaching process involved monthly four-hour team coaching meetings that were conducted at the hotel in Swaziland for a period of three years. Multiple sources of data were collected throughout programme implementation for the purpose of conducting formative and summative programme valuation needed for programme refinement.

Data collected for **formative programme valuation** included **descriptive feedback sheets, coaching tools and techniques, field notes, reflective letter writing, document reviews and secondary reports**. The **summative programme valuation** was primarily conducted by means of an **individual qualitative interview**, complemented **by field notes** to explore whether the programme had met its outcome or destiny.

#### **b.i) Descriptive feedback sheets**

**Descriptive feedback sheets** were used as a valuation tool during the termination phase of some coaching meetings. The objective was to obtain descriptive written feedback of managers' experiences of coaching meetings. It entailed simple qualitative questionnaires that consisted of three to five open ended questions (Wadsworth, 1997:46). Wadsworth (1997:67) advises as a rule of thumb to try not to ask more than five questions to ensure participation in this kind of feedback. Managers were requested to reflect on their experiences of coaching meetings and to complete the descriptive feedback sheet. Programme aspects pertaining to the team coaching agenda for the day guided the formulation of the descriptive feedback sheets. See appendix 7.1 for samples of completed descriptive feedback sheets that were obtained during different coaching meetings.

#### **b.ii) Coaching tools and techniques**

During team coaching meetings different coaching tools and techniques were used that resulted in the generation of valuation data, namely **generative conversations**, a company prescribed **business analysis model** and **metaphors**.

**Generative conversations** that focused on specific topic choices related to the Appreciative M&A team process were an important source of valuation data. Generative conversations as a data source refer to group discussions that stimulated candid feedback regarding managers' programme experiences during team coaching meetings. Additionally, it entailed a process of

reflective dialogue between managers, the co-coaches and myself, related to reflective letter writing. The generative conversational approach fits an Appreciative Inquiry framework related to the potential of these conversations to generate an affirmative future (Bushe, 2007:5). The management team were, for instance, asked to discuss the value of coaching meetings as a group and to generate recommendations for programme improvement. The objective was to provide them with permission to express unmet needs (Wadsworth, 1997:65). These conversations resulted from time to time in reaching consensus about aspects of the team coaching programme that should remain unchanged, recommendations regarding changed practices and wishes for entirely new practices (Wadsworth, 1997:70/71).

The data that emerged from generative conversations included managers' perceptions, observations and feedback regarding their engagement in the programme or related aspects in the context of the research (Wadsworth, 1997:64). Generative conversations were an integral part of each team coaching meeting. It therefore makes sense that the accrued data of these conversations were reflected in the **reflective letters** that we (co-coaches and I) compiled at the end of each coaching meeting. Gmeiner and Perkins (2006:56) are of the opinion that the very act of writing down an experience can elucidate a problem, enhance critical analytical thinking and allow people to work through challenges.

These letters fulfilled the dual purpose of providing valuation data regarding managers', co-coaches' and my own experiences of the programme, as well as serving as an important coaching tool to facilitate continued personal and professional growth. Managers were requested to respond to these letters sent to them as a way of member checking, reflecting on the process and dynamics of the preceding coaching meeting, answering generative questions and preparing them for the next session. Bolton (2001:13) is of the opinion that stories shared through reflective practices are containers of knowledge, skills and experiences that are taken back to enhance practice (Bolton, 2001:13). Reflective letter writing involves a process of experiential learning. Carl Rogers (*in* van Wagner, 2007:1) notes: "Experience is, for me, the highest authority. The touchstone of validity is my own experience. It is to experience that I must return again and again, to discover closer proximity of the truth as it is in the process of becoming me. My experience is not authoritative because it is infallible. It is the basis of authority because it can always be checked in new primary ways".

Reflective dialogue in the form of reflective letters between managers and the co-coaches and I, is reflected in appendix 7.2.

The company stakeholders prescribed the annual use of a specific business analysis model, namely the **Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis** to assess the outcomes and experiences of managers of the coaching process to be conducted at the end of the yearly coaching cycle (Zeus & Skiffington, 2000:48–49). Three SWOT analyses were therefore conducted in the course of the three years that I remained in the research context. Managers were requested to discuss their general reflections and valuation of the previous years' team coaching guided by the four elements of the SWOT analysis and then to envision the future. The use of the SWOT analysis within an Appreciative Inquiry framework is discussed as part of the limitations in Chapter seven.

The use of **metaphors** was meaningful as a valuation tool in the context of this research. According to Dilts (2003:21&22) metaphors and analogies allow us to draw parallels between one context or experience and another, leading to creativity and the ability to focus on the deeper structure of our experiences. Creswell (2007:194) adds metaphors “provide visual and spatial images ... of social actions.” I used metaphors to create a context of safety for managers to allow them the freedom to share their experiences of programme aspects (Dembkowski, et al. 2006:105).

See appendix 7.3 for two samples of SWOT analyses that were conducted with the team (2004 & 2005), complemented by the use of a metaphor for valuation purposes (If 2004's coaching was a fruit, a tool, the weather or an animal, what would it be like?).

### **b.iii) Field notes**

**Observational, theoretical, methodological and personal reflective notes** – as previously described – were used as a **data triangulation measure**. As the primary programme agent my role changed significantly in the second stage of programme implementation. I became more immersed in the setting. In a sense I was simultaneously an insider and an outsider. The insider role was related to my immersed position as a team coach. The outsider role referred to the demands that I had as a researcher to report findings in a legitimate way, thus trying to refrain from getting over involved. Patton (2002:268) contends that it is a methodological challenge to manage the tension of being simultaneously fulfilling different roles as a researcher. The secret is to combine participation and observation in such a way that the evaluator-researcher acquires understanding of the setting as an insider, while describing it to and for outsiders.

I engaged in **private and public reflexive processes**. Privately practiced reflexivity meant inner conversations that involved inner dialogue, as well as writing activities that were not shared explicitly with others. At times reflecting posed to be painful, at other times it resulted in 'a-ha' moments that filled me with joy. The personal notes assisted me to deal with my own internal environment. They reflected amongst others my own biases, challenges, sense of achievements and own learning and growth.

Personal experiences are focused on four directions according to Ellis and Bochner (*in* Denzin & Lincoln, 2000:417): inward, outward, backward and forward. Inward includes feelings, hopes, reactions and moral dispositions. Outward refers to existential conditions or environment, while backward and forward focus on temporality namely the past, present and future.

**Public reflexive processes** entailed reflective conversations with the two co-coaches (field workers) and other colleagues or peers during the research process. These notes included present and retrospective reflections described in 2.4.1.5.c. I also answered the final research question posed to managers in this phase myself, namely: "How did the team coaching process assist you personally, with other people and with your working environment?" This action was in line with the auto-ethnographic strategy chosen to capture the meaning that I brought to the context of this research as part of the "multiple layers of consciousness" reflecting in the way the research account was told (Ellis & Bochner *in* Denzin & Lincoln, 2000:739–748).

Appendix 7.4 contains field notes that I compiled during this stage of programme implementation, including retrospective field notes, an auto-ethnographic reflection on the final research question posed to managers and observational notes compiled after two qualitative interviews.

#### **b.iv) Document reviews**

I agree with Patton (2002:293) that documents provide a rich source of information about programme experiences. **Coaching logging reports**, compiled in collaboration with the co-coach, were an important source of evidence based on the vast amount of data obtained in these logging reports pertaining to prior meeting preparations, the intended outcomes of meetings and the process and dynamics of meetings. The coaching logging reports evolved over time and became more focused and coaching oriented as we developed as team coaches. Twenty four coaching logging reports that were compiled during the three year period, commencing in May

2003 and ending in April 2006, were ultimately analysed. See appendix 7.5 for a coaching logging report sample.

Other documents that were consulted as part of the document review included **correspondence** from and to the team and between company stakeholders and myself. Additionally, **company newsletters, quest questionnaires, minutes of goals meetings and financial statements** were reviewed. These documents assisted me in discovering information that I could not observe (Patton, 2002:293), for example when the team met its financial targets and customer expectations, which comprised an important aspect of sustained performance in the context of this research

#### **b.v) Qualitative individual interview**

One of the requirements for **summative programme valuation** in the second research phase was to generate understanding of whether the programme had met its destiny, namely to facilitate managers' mental health for sustained performance within a context of company culture integration. A qualitative individual interview was chosen as a data collection method to achieve this end. Rubin and Rubin (1995:4) support this choice by indicating that the qualitative interview technique is well-suited for "all kinds of" programme evaluation. They ascribe this ability to the dual nature of qualitative interviewing, as both an academic and a practical tool, and contend that it allows us to enter the worlds of others to generate holistic understanding that can serve as a basis for solving problems or improving programmes (Rubin & Rubin, 1995:5).

The **qualitative individual interviews were semi-structured** in nature. A semi-structured interview is defined by de Vos, *et al.* (2005:292) as an interview that is organised around specific areas of interest, while still allowing considerable flexibility in scope and depth. One question that addressed different aspects of mental health (Perko & Kreigh, 1988:27) was asked to managers during the interviewing process, namely:

- How did the team coaching process assist you in your relationship with yourself, others and the environment?

The **interviewing process** was divided into three stages: **pre-interview, interview and post-interview stages**. I invited managers to participate in the interviewing process; a time and place was agreed upon, informed consent was obtained from each manager prior to conducting the

interview and the data were transcribed. I utilised **facilitative communication skills** as described in 2.4.1.4 to create an environment conducive for disclosure. Appendix 7.6 contains the transcript of a qualitative individual interview.

#### **b.vi) Secondary reports**

**Secondary reports** refer to feedback from others (Anon, 2007:2), such as the co-coach, Director of Organisational Behaviour, the Chief Executive Officer, the General Manager of the hotel and any other colleagues involved with the team. This feedback added other perspectives that could be explored and used for programme refinement. I acknowledge the fact that this data were biased, because secondary accounts are situated within the world of the person constructing the account.

Lastly, **second order reflective thinking** was demonstrated by obtaining reflections from the person that transcribed the audiotapes of the individual qualitative interviews. With 'second order reflective thinking' I mean a **next level of reflection** related to being an outside witness of the shared accounts. The decision to include a next level of reflective thinking was based on the added value of allowing multiple realities to emerge during the research process. It was also a way of respecting the stories and the multiple actors engaged in constructing these stories. The **transcriber** was requested to compile reflective notes after transcribing each interview based on her experiences of being engaged with these stories from a listening stance. She gave written informed consent for the use of her reflections as part of the research text (Appendix 4). Appendix 7.7 contains a sample of transcriber reflections.

#### **2.4.2.5 Data analysis**

**Tesch's descriptive method of open coding**, adapted from Creswell (1994:154–155) and described in 2.4.1.6 was consistently used to analyse data in this research phase. The complete set of triangulated data consisted of completed naïve sketches, transcripts of the focus group and qualitative individual interviews, field notes, completed descriptive feedback sheets, recorded findings of the three SWOT analyses, complemented by the data of a metaphoric exercise, reflective letters, documents and secondary report accounts.



#### 2.4.2.6 Literature control

A **literature control** was conducted, meaning that I used established theory to re-contextualise and support new findings. The literature control was also conducted to demonstrate the usefulness and implications of the findings (Morse & Field, 1996:106), thus advancing the discipline of business coaching specifically. In essence the literature control entailed comparing findings with relevant theories; existing research and information from other literature sources related to the research phenomenon, with the intention of identifying similarities, differences and unique contributions of this research.

#### 2.4.2.7 Data management

Linked to the need to organise data logically in a primary resource package (Merriam, 1991:186), I filed the voluminous volume of empirical evidence consisting of textual data mainly in two marked files, one for each programme stage. These files will be kept under lock and key for a period of two years after I have published my first article.

### 2.4.3 Research Method Of Phase Three: Expert And Auto-Ethnographic Valuation And Refinement To Establish The Worth Of An Appreciative M&A Team Coaching Programme

Denzin and Lincoln (2003:599) point out that “evaluations conducted qualitative can make little contribution to social policies and programmes if they are not perceived as credible – defensible, enlightening and useful – by at least some evaluation users”, therefore the focus on a credible valuation process in this research.

The **objectives** of the last phase of the research were to **valuate the worth of the programme** from an **expert stakeholder group and auto-ethnographic perspective**, followed by the **generation of programme refinement recommendations** to improve future programme applicability in a Southern African hospitality environment. Wadsworth (1997:29) describes this phase as “involving evaluating possible future practice”. He is of the opinion that it entails “vision, creativity and imagination”. It means that the valuation process should establish the “fit of the innovation” based on refinements that would ultimately optimise the fit (Guba & Lincoln, 1981:51).

**Summative expert** and **auto-ethnographic valuation** were incorporated in this phase. **Summative expert valuation** refers to **peer-reviewed programme valuation** that was inductively conducted by an expert stakeholder group to establish programme worth. The aim of summative expert valuation was to establish the outcomes of the programme with specific reference to the contexts in which these outcomes emerged (Guba & Lincoln, 1981:49). The valuation therefore occurred based on a description of programme implementation, formative and summative valuation and refinement that occurred during stage two of programme implementation (Chapter five). The **auto-ethnographic valuation** refers to the inclusion of my personal experiences as a researcher and team coach regarding the outcomes of the programme and my perceptions regarding programme worth.

The **first step** was to answer the question: “What would a worthy programme entail in the context of this research?” In line with a post-modern viewpoint I believe that there is no single standard of truth. Programme worth in this context, therefore, refers to the credibility of the programme as viewed by academic and business audiences. Does it evoke in these audiences the feeling that it is a worthy programme? Is it described in such a way that it is lifelike, believable and possible? (Ellis *in* Denzin & Lincoln, 2003:220). How authentic is it in terms of representing the contextualised programme experiences and meanings, rather than researcher bias? How credible and trustworthy is this programme based on applied strategies of triangulation, member checks and peer examinations?

In my quest to provide sufficient evidence for these audiences to trust the scientific nature of the research outcome (a worthy Appreciative M&A team coaching programme to facilitate managers mental health for sustained performance), I generated context-specific criteria of worthiness. These criteria were the outcome of consulting numerous research and literature sources that address naturalistic evaluation. I commenced this process by integrating Guba’s model of trustworthiness (*in* Krefting, 1991:214–222), Wadsworth’s (1997:31–33) “signs of good evaluation” and Babbie and Mouton’s (2001:357–358) discussion of qualitative evaluation. During the process of programme implementation, however, I discovered the work of Preskill and Catsambas (2006) focusing on “Reframing Evaluation through Appreciative Inquiry”. I realised the need for aligning the scientific driven criteria of worthiness with theoretically driven criteria of Appreciative Inquiry to match science and practice effectively (Preskill & Catsambas, 2006:39).

The outcome **was eight criteria of worthiness** that served as a frame of reference to make conclusions regarding the worth of the programme (Babbie & Mouton, 2001:357–358; Krefting, 1991:214–222; Preskill & Catsambas, 2006:39; Wadsworth, 1997:31–33):

1. The programme achieve its destiny, namely to facilitate managers' mental health for sustained performance within a context of company culture integration.
2. The programme is guided by a credible programme design and methodology, reflecting structural coherence and programme agent (researcher) authority.
3. The programme has future applicability value based on a dense description of the program structure and process, as well as its fit within the context under study.
4. The programme is confirmable based on applied practices of triangulation and reflexivity.
5. The programme is dependable because it is densely described and offers a conceptual, analytical and interpretative framework for repeating the programme.
6. The programme approach and methodology elicit stakeholder collaboration, cooperation and participation.
7. The programme employs a variety of perspectives to generate understanding about the unique context.
8. The programme establishes a linkage between mental health facilitation and sustained performance.

The **second step** involved the inclusion of an expert stakeholder group to establish programme worth and to generate recommendations for programme refinement through dialogue. I used purposive sampling to select the expert stakeholder group based on their perceived experience and knowledge in diverse, yet complementary organisational fields (de Vos, *et al.* 2005:202). The expert stakeholder group consisted of external experts including academic, business and coaching partners, as well as an internal expert group which included company stakeholders and the team coaches that co-facilitated the programme.

The **third step** entailed the inductive collection of data by means of a naïve sketch that I distributed to the expert stakeholder group (Giorgi, 1985:1). The inductive nature of the data collection process meant that the expert stakeholder group did not receive the criteria of worthiness prior to the valuation process in an attempt to allow them to value the programme from an open stance. In line with the auto-ethnographic strategy I completed the same naïve sketch, thus incorporating my personal reflections about the programmes' worth and suggesting recommendations for future programme refinement.

The naïve sketch consisted of three questions embedded within an Appreciative Inquiry framework (Preskill & Catsambas, 2006:35). The first two questions aimed to elicit data that would provide evidence of programme worth, namely:

- What do you think contributes to the worth of the programme (what worked)?
- What do you most value about the programme?

The last question aimed to generate refinement recommendations to improve the future applicability of the programme or, as Wadsworth (1997:29) suggests, “evaluating possible future practice”, thus assessing refinement options based on future vision, creativity and imagination as mentioned above.

- If you had wishes to enhance the worth of the programme, what would it be?

A **fourth step** was to analyse the data guided by Tesch’s descriptive method of open coding (Creswell, 1994:154–155). Data interpretation included a process of comparing the findings of stakeholders’ programme experiences and recommendations, complemented by my own reflections with the criteria of worthiness to make final conclusions regarding programme worth. These conclusions formed the basis of the description of the summative refinement activities as **step number five**, which additionally entailed a **literature control** to re-contextualise new theory in existing literature sources (Morse & Field, 1996:107).

See appendix 8.1 for samples of naïve sketches that the expert stakeholder group completed, including the auto-ethnographic naïve sketch.

#### **2.4.4 Measures To Ensure Trustworthiness**

According to Lincoln and Guba (1985:294) **trustworthiness** is a **method of establishing scientific rigor** in qualitative research without sacrificing significance. Hammersley (*in* Denzin & Lincoln, 1994:487), is quoted as saying: “An account is valid or true if it represents accurately those features of the phenomena that it is intended to describe, explain or theorize.” Guba’s model of trustworthiness (*in* Krefting, 1991:214–222) was chosen as a frame of reference to ensure credible research practices throughout the interactive research process. This model proposes four criteria of trustworthiness, namely: (a) **truth value**, (b) **applicability**, (c) **consistency** and (d) **neutrality**. These criteria are realised through multiple strategies (*in* Krefting, 1991:215) that are described below.

#### 2.4.4.1 Truth value

Krefting (1991:215) states that **truth value** is based on the **credibility of the findings**. In other words, can the findings be trusted as a true reflection of the multiple realities constructed by participants and the context in which the research was undertaken? The same author concedes that truth value is the most important criterion for the assessment of trustworthiness. It entails sufficient submersion in the research setting to enable recurrent patterns to be recognised and verified (Krefting, 1991:215).

The post-modern underpinnings of qualitative research emphasise multiple realities. Creswell (2007:44) supports this notion by stating that there are no “right” stories, “only multiple stories”. Yet, in the context of this research I sought to present stories that were accurate reflections of stakeholders’ realities, as evidenced by the use of the following **strategies** to enhance the truth value or credibility.

##### a) **Prolonged engagement**

**Prolonged engagement** is proposed as a strategy to prevent distortions of the findings related to the researcher and field workers’ (co-coaches) presence at the research site or their involvement with participants (Guba & Lincoln, 1981:105). It entails spending an extended period of time with participants to allow the researcher to check perspectives. It additionally assists participants to become familiar to the researcher (Krefting, 1991:218).

The first field worker (Annie) and I gained entry into the field prior to data collection. Our entry was negotiated through the Director of Organisational Development. We first met with relevant company stakeholders and thereafter with managers to explain the proposed research at that particular point in time and to invite them to participate in the research. This was done to establish rapport with stakeholders and to build mutual trust. As an African woman, Annie’s fit was congruent with the management team’s ethnic orientation, thus allowing for increased cultural sensitivity during the initial period of programme implementation. On Annie’s departure, Jeanette, an internal team coach, joined the research process. Both field workers were acquainted with the acquirer’s organisational culture. The field workers (Annie and Jeanette) and I remained in the context for a period of three years aligned to our intent to provide a legitimate account of findings.

Managers' were exposed to numerous coaching meetings during the three years. The multiple contact sessions with them allowed continual observation of the research phenomenon under a variety of natural situations. I observed that as time passed and rapport increased, managers' started to volunteer more sensitive information and their interactions with us (field workers and I) became more authentic (Krefting, 1991:218).

## **b) Triangulation**

As a method of verifying the information, **triangulation of data methods** was used to maximise the range of data that might contribute to an increased understanding of the research phenomenon (Creswell, 1994:7; Krefting, 1991:219). The triangulation of data methods refer to the collection of data through various means, namely naïve sketches, focus groups, field notes, descriptive feedback sheets, coaching tools and techniques, document reviews, secondary reports and qualitative interviews.

Additionally, the use of different stakeholders (management team, company stakeholders, team coaches and an expert stakeholder group) throughout the research process can be seen as **triangulation of different data sources**, thus enhancing the usefulness of the findings. In phases one and two it entailed a direct focus on the management team complemented by the involvement of the company stakeholders and team coaches. In phase three different experts were engaged in the final summative programme valuation as a measure of triangulation to enhance the credibility of the programme.

**Triangulation of investigators** was employed as an additional strategy to enhance the credibility of the findings (Merriam, 1991:169). In the context of this research, it refers to the engagement of **two supervisors** and **two field workers** that collaborated with me for the duration of the research process. It also involved the services of an **independent co-coder** for code-recoding purposes as suggested by Tesch's method of open descriptive coding (Creswell, 1994:155).

**Theoretical triangulation** involved the use of a literature control in phases two and three to substantiate and compare findings with existing theory and research. It also entailed a clear statement of the theoretical parameters of the research, with reference to the meta-theoretical, theoretical and methodological perspectives described in Chapter one (de Vos, et al. 2005:346).

**c) Reflexivity**

To prevent extreme over-involvement in the triangular coaching relationship, I practiced **reflexivity** (Krefting, 1991:218). I kept **informal and formal field** notes of my involvement in research activities relating to the programme evaluative cycle. It included **personal reflections** based on my personal background, perceptions, feelings and role as a researcher and the potential influence of these factors on the research process (Krefting, 1991:218), thus aiming to clarify researcher biases. Writing **reflective letters** to the team and compiling **coaching logging reports** during the second phase of the research further provided me with an opportunity to expose personal perceptions and feelings in a formal fashion.

**d) Authority of the researcher, field workers and supervisors**

My role as researcher was clearly identified as a **doctoral student** in Psychiatric Nursing Science who had successfully completed training in research methodology on masters and doctoral level. During the course of this research I also obtained a **professional business and life coaching qualification** (University of South Africa accredited). The research was an extension of previous research that I conducted, indicating a certain degree of familiarity with the phenomenon under study. My previous research served as evidence that I am able to conceptualise large amounts of data, as well as incorporating different theoretical perspectives. As an advanced psychiatric nurse practitioner I have extensive experience in **interviewing and observational techniques** (Krefting, 1991:220).

The field workers who collaborated in the research process obtained formal post-graduate training in a variety of disciplines, including mental health, business coaching, education and research. The two supervisors who oversaw the research had received institutional, national and international research recognition. They attended three team coaching meetings during the three years that I remained in the field. This decision was based on their need to acquaint themselves with the research setting, the management team in particular and the evolving research processes and outcomes.

e) **Peer examination**

**Peer evaluation** involved **reflective conversations** between the field workers and myself regarding programme implementation. It also involved **monthly coaching facilitators' meetings** with the company stakeholders and other colleagues engaged in the context of the research. These conversations provided new insight and direction that assisted me to assess continually what the next step in the programme evaluative cycle should be. Additionally, regular **discussions with the supervisors** enhanced the neutrality of this research, complemented by **formal and informal discussions with impartial colleagues** regarding the research process and findings (Merriam, 1991:169). Peer examination was enacted by requesting an **expert stakeholder group** to evaluate the worth of the programme during phase three of the research (Chapter six). Lastly, **presenting** the evolving design and process to scholars and business partners on **national and international conferences** ensured another level of peer examination. The various forms of formal and informal discourses raised awareness regarding my personal values and guided me towards the next steps in the research process.

f) **Member checking**

**Member checking** was conducted throughout all three phases of the research process to minimise misrepresentation of findings (Krefting, 1991:219). It involved **formal and informal discussions** with the managers, company stakeholders, co-coaches and expert stakeholder group to verify findings. It also entailed member checking of the **coaching logging reports** by managers prior to the dissemination thereof to the company stakeholders (phase two). This strategy aimed to build a relationship of trust with managers by allowing them to add or question information, to make changes and offer interpretations regarding the written representation of each coaching meeting. It additionally served the purpose of checking different stakeholder perceptions. The inclusion of an **independent coder** was additionally seen as a form of member checking of findings in this research.

g) **Negative case analysis**

**Negative case analysis** refers to the disclosure of cases that do not fit the identified themes (Mertens & McLaughlin, 2004: 105). This was achieved through the disclosure of managers'



experiences of the cross-cultural M&A in the first stage of the research that did not correlate with the findings of my previous research (Chapter four).

#### h) **Structural coherence and creating a chain of evidence**

**Structural coherence** entails the integration of the “masses of loosely connected data” in the thesis to create a logic wholistic picture (Krefting, 1991:220). Evidence is structurally coherent when the different parts of evidence verify each other, the story holds up, the parts fit and the facts are consistent (Guba & Lincoln, 1981:106). Structural coherence was obtained through a **well-structured and densely described research design and method**, including **management of data, member checks** and **dense descriptions of findings** to eliminate inconsistencies (Yin, 1994:94&98). A **chain of evidence** was created by means of supporting findings by **direct quotations** from the database and a description of **contextual realities** during data collection. Findings were aligned to the **paradigmatic perspectives** described in Chapter one (1.5), as well as to existing theory in the form of a literature control.

#### i) **Referential adequacy**

**Referential adequacy** was established by **attaching documents as appendices** to allow academic audiences to critically assess the ethical aspects adhered to and the interpretations that I made from direct quotations and documents. The appendices include samples of letters of informed consent and empirical evidence in the form of textual data that contained direct stakeholder quotations to support evidence of findings.

#### 2.4.4.2 **Applicability**

Merriam (1991:173) states that **applicability** is concerned with the extent to which the research findings of one study can be applied to other situations. It is the ability to generalise the research findings to other contexts, settings or groups. Applicability is a controversial topic in qualitative research (de Vos, et al. 2005:346). Some researchers describe the generalisability of qualitative findings to other contexts, setting or groups as a weakness of the approach, while others argue that it is not the responsibility of the researcher to generalise or transfer the findings to different contexts (de Vos, et al. 2005:346). Lincoln and Guba (1985:297) argue that the criterion of transferability is a way of assessing the applicability or goodness of fit between a specific

research study and other possible research contexts. My responsibility as a qualitative researcher in addressing the issue of applicability ended with a presentation of sufficient descriptive data to allow comparison in all three the research phases (Merriam, 1991:173). Strategic choices to ensure transferability in this research are described next.

**a) Dense description**

I provided a **dense description** with a wide range of information about the participating stakeholders and the research context to allow others to assess the transferability of the findings. I additionally provided a dense description of the findings of the research supported by direct quotations from participants to provide an adequate database to allow transferability judgements to be made by others (Krefting, 1991:220).

**b) Nominated sample**

A nominated sample refers to the selection of research participants that are representative for the particular study population (Krefting, 1991:220). **Purposive sampling** was the sampling method of choice in all three research phases, complemented by **purposive, emerging sampling** in the second phase (Krefting, 1991:220). Selection criteria guided the choice of stakeholders. The Director of Organisational Development initially identified the managers and the context as representative of the research phenomenon (the generation of a worthy M&A team coaching programme in a cross-cultural M&A context).

The **member checking strategies** described above were also useful in identifying whether the data were typical of the research phenomenon in spite of the uniqueness of the context.

**2.4.4.3 Consistency**

**Consistency** is seen as an alternative to reliability in qualitative research (de Vos, *et al.* 2005:346). It considers whether the findings would be consistent if the inquiry was replicated with the same subjects or in a similar context (Merriam, 1991:170). The uniqueness of the human situation prescribes that qualitative researchers should seek variation in experience rather than identical repetition (Field & Morse *in* Krefting, 1991:216). This is based on the fact that people will always differ in their perceptions, attitudes and experiences. Consistency is therefore defined in terms of dependability, namely variability that can be ascribed to specific sources such as

increasing insight on the part of the researcher, changes in the life situations of the participants and looking at the range of experience rather than the average experience, implying that atypical situations are important to include in the findings (Krefting, 1991:216). A description of dependability strategies is reflected below.

**a) Dependability audit, including a dense description of the research method**

The design, methods of data collection, analysis and decisions that were made during the research process were described in detail in order for independent researchers (co-coder, supervisors and others that are interested) to follow my research trail (Merriam, 1991:172), thus increasing the dependability of the research.

**b) Code-recoding procedure**

An independent co-coder with a doctoral qualification in Psychiatric Nursing Science and formal experience in qualitative data analysis and business team coaching was involved in data analysis, including a consensus discussion to finalise thematic representation of findings (Creswell, 1994:155). Code-recoding procedures were followed as suggested by Tesch's open descriptive method of coding (Creswell, 1994:154–155).

**c) Stepwise replication of research**

The **stepwise replication** aspect implies that I took care to describe the entire research process in such a fashion that other researchers can follow similar steps.

Other means employed to increase the **dependability** of the research included **prolonged engagement** and **peer examination** that were described as part of the strategies to ensure truth value.

#### **2.4.4.4 Neutrality**

The fourth criterion of trustworthiness is **neutrality**. It captures the traditional concept of objectivity and whether the findings of the research could be confirmed by another study (de Vos, *et al.* 2005:347). Neutrality reflects the extent to which research procedures and findings are free from bias (Krefting, 1991:216). Lincoln and Guba (1985:299/300) suggest that the emphasis of

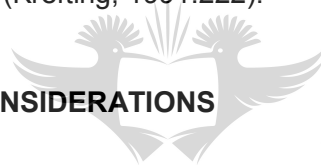
neutrality in qualitative research should shift from the researcher to the data, so that rather than considering the neutrality of the researcher, the neutrality of the data are judged. Confirmability strategies that were adhered to in this research are described below.

#### a) **Confirmability audit**

I adhered to Lincoln and Guba's (*in* Krefting, 1991:221) suggestion that the researcher should create a chain of evidence that should reflect consistency throughout the research process. I kept records of raw data, condensed notes of data reduction and analysis, as well as process notes in case an auditor would want to verify the trustworthiness of the research findings and conclusions.

Another **confirmability strategy** that was practiced in the context of this research included **peer examination**, specifically with reference to the involvement of research partners that are familiar with qualitative methods (supervisors & field workers). Other confirmability strategies were: **triangulation of multiple methods, data sources** and **theoretical perspectives** as well as practicing **reflexivity** (Krefting, 1991:222).

## 2.5 **ETHICAL CONSIDERATIONS**



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I adhered to the internationally agreed upon ethical principles stipulated by the Belmont Report (Amdur, 2003:23–31) in an attempt to honour the contributions made by the stakeholders involved in this research. These principles entail **respect for persons, beneficence** and **justice** and specify the conditions following from each principle. For a comprehensive description of the ethical considerations refer to Chapter one (1.8).

## 2.6 **SUMMARY**

Chapter two described and justified the research design, strategy and method that governed the three phases of the research process, including measures to ensure trustworthiness. Chapter three presents a brief overview of the M&A team coaching programme that emerged from the conceptual framework that I described as part of the findings of my master's study.

# Chapter 3

## OVERVIEW: GUIDELINES TO FACILITATE AN M&A TEAM COACHING PROGRAMME TO FACILITATE MANAGERS' MENTAL HEALTH

*“What I wrote were things that assailed me many times from within; I permitted the spirit of stories told to move me to speak out.”*

(Jung in Haarhoff, 1998:73)

### 3.1 INTRODUCTION

Chapter one provided the rationale and overview of the research. Chapter two addressed the research design, strategy and method. The intent of this Chapter is to present an overview of the research process that guided the preceding research, namely “Stories of Merger and Acquisition change: A team based approach in promotion of mental health” (Visagie, 2002). I begin the Chapter with an overview of the research objectives, design and method of the former research, followed by a condensed version of guidelines that were co-constructed for the advanced psychiatric nurse practitioner as a framework of reference to facilitate a context-specific M&A team coaching programme. For a comprehensive description of these guidelines, refer to Chapter four in “Stories of Merger and Acquisition change: A team based approach in promotion of mental health” (Visagie, 2002:101–133).

### 3.2 RESEARCH OBJECTIVES, DESIGN AND METHOD

The preceding research provides an account of two management teams' lived experiences of M&A change in a South African hospitality environment (Visagie, 2002). The company had not yet acquired property outside the borders of South Africa at the time. The research arose from a request of the company's Director of Organisational Development to conduct research to assess the influence of the M&A change process on a particular segment of their workforce, namely the aforementioned operational management teams. The need for the research was confirmed by a previous study that had been conducted by internal stakeholders in the same company, finding that exposure to M&A activities posed a threat to the mental health of these managers (Gmeiner & van Wyk, 2001:5, 7–8). Managers were reported to express feelings of mental discomfort such

as being unmotivated, angry and insecure in the presence of an M&A, consequently resulting in a decrease in productivity (Gmeiner & van Wyk, 2001:4).

Conducting the research from an external stakeholder position generated a fresh outlook on the research phenomenon. The significant research contribution was that I described guidelines for advanced psychiatric nurse practitioners, as a framework of reference, to promote (facilitate) the mental health of managers engaged in context-specific M&A activities through an M&A team coaching programme.

The **objectives** of the research was to explore and describe the lived experience of these management teams regarding the influence of an M&A change process, to explore and describe recommendations made by them in order to address challenges related to the M&A change process and, lastly, to co-construct and describe guidelines for the advanced psychiatric nurse practitioner to facilitate an M&A team coaching programme to promote the mental health of managers exposed to M&A change in the company.

I referred to a team coaching programme for empowerment and promotion of mental health in the original research text (Visagie, 2002:102). Sustainability of change was defined as part of the outcome of such a programme with reference to “empowered team members supporting change collectively” (Visagie, 2002:105). Note that the phrase ‘promotion of health’ and the concept ‘empowerment’ refer to ‘facilitation of health’ and ‘sustained performance’ in this thesis. I shall therefore use the latter concepts in the rest of this thesis to ensure semantic consistency.

A qualitative (Babbie & Mouton, 2001:271), exploratory (Mouton, 1996:103), descriptive (Merriam, 1991:11/12) and contextual (Babbie & Mouton, 2001:272) **research design** was followed to achieve the stated objectives. The **research strategy** entailed multiple descriptive case studies (Yin, 1994:13) during which data was gathered by means of **focus groups** (Krueger, 1994:14, 15, 19, 29), **field notes** (Wilson, 1989:434–436), **naïve sketches** (Giorgi, 1985:4, 8) and **drawings** (Elledge & Phillips, 1994:222). The multiple sources of evidence were analysed, using Tesch’s descriptive method of open coding (Creswell, 1994:154), after which they were integrated into existing literature to re-contextualise data (Morse & Field, 1996:107). The triangulated data sources indicated that different narratives constructed the influence of an M&A change process in the research context, as reflected below.

### 3.3 SUMMARY OF FINDINGS

The findings of the research reflected four interrelated major themes, namely **problem-saturated stories**, **alternative stories**, **stories of M&A change as a paradox** and **recommendations** to address the challenges integral to the M&A change process in this context. **Problem-saturated stories** mirrored dark, emotional-laden experiences resulting in a process of disempowerment that was characterised by decreased organisational productivity. The psychological influence of the M&A change process stemmed from these experiences. It evolved as fear and not knowing, which created job insecurity, ineffective communication processes feeding low morale, autocratic decision-making processes, culture diversity (a “we versus them” mentality), a mask of distrust and resistance to change as evidenced by emotional responses and defence mechanisms that were implemented in the coping process. These stories threaten mental health at an individual and a collective level (Visagie, 2002:60–83).

**Alternative stories**, on the other hand, inspired preferred realities indicating that “change leads to growth” (Visagie, 2002:83–86). **Stories of M&A change as a paradox** mirrored the experiences of change as a phenomenon with contradictory facets that operate simultaneously. Managers described contrasting experiences such as different viewpoints regarding the acquirer, feeling insecure versus feeling secure and not knowing versus knowing (Visagie, 2002:86–89).

Lastly, managers shared their views to address the challenges of an M&A change process when they voiced **recommendations**. These recommendations centred on practices that reflect managerial competence, speaking a language of influence and specific factors that would contribute to a constructive M&A change process, namely sharing the vision of the acquirer and having a sense of belonging and fit (Visagie, 2002:90–99).

These themes, verified by a literature control to re-contextualise the data, formed the basis of the conceptual framework described below.

### 3.4 DESCRIPTION OF GUIDELINES TO FACILITATE AN M&A TEAM COACHING PROGRAMME IN A SOUTH AFRICAN HOSPITALITY ENVIRONMENT

The findings described above, served as a departure point for me in generating guidelines for the advanced psychiatric nurse practitioner, to utilise as a framework of reference for facilitating the

mental health of managers in this context. The guidelines, guided by a conceptual framework that reflects Dickoff, James and Wiedenbach's (1968:423) thinking map, focusing on the agent, recipient, context, procedure, motivation of the activity or programme and the envisioned outcome, are described next.

The following table, adapted from Visagie (2002:103), lists the aforementioned concepts as they applied to the research:

**Table 3.1 Thinking map according to Dickoff, et al. (1968:423)**

Agent	Advanced psychiatric nurse practitioner who fulfils the role of an external team coach.
Recipient	Managers belonging to a management team involved in an M&A change process.
Context	The hospitality environment with reference to a South African property and hotel owning group engaged in M&A activities, thus implying a need for company culture integration.
Motivation	To generate an appreciative learning context for these managers that focuses on the strengths and possibilities of the M&A change process, rather than the problems and deficits.
Procedure	Rewriting problem-saturated M&A stories through a team coaching programme that is embedded in Appreciative Inquiry and group development theory.
Outcome	Productive and empowered managers supporting change collectively from a position of facilitated (promoted) mental health.

#### **3.4.1 Programme Agent: Advanced Psychiatric Nurse Practitioner Who Fulfils The Role Of An External Team Coach**

An advanced psychiatric nurse practitioner being suggested to perform the activity of programme agent in the specific company may cause raised eyebrows. Connecting a psychiatric nurse to the business world may appear a strange reality to some, but in this company, advanced psychiatric nurse practitioners played an important role in realising the team-based approach of the company. Research conducted by Gmeiner and van Wyk (2001:3–17) in the same company about the facilitation of a team building process, confirms this reality.



The role of the advanced psychiatric nurse practitioner in this setting was firstly **consultative** based on the notion that the proposed team coaching programme should be a long-term effort that needs sponsorship from leaders in the organisation (Bushe, 2001:4). Lifelong learning principles underpinned this programme based on the sustaining quality of internalising values, strategies, knowledge, skills and new learning experiences. Senge, et al. (1999:529) describes 'sustained learning' as a willingness to "keep learning from the experience of pursuing a sustainable goal ...". Guest (1999:2) adds that a high degree of senior level buy-in and commitment will enhance the success of a coaching programme that is related to the coordination and focus provided by top leaders.

It was proposed that the **advanced psychiatric nurse practitioner** facilitating the team-coaching programme should be an **external team coach**. The findings of the research indicated that managers felt less threatened and more willing to open up in their relationship with external team coaches (Visagie, 2002:106). Bushe (2001:5) reflects on the effects of socio-political constraints of corporate realities resulting in the tendency not to air conflicts, especially in pre-identity groups. A pre-identity group refers to a newly formed group, as in the case of merged teams (Bushe, 2001:4). Noer (1997:179) writes, "None of us are prophets in our own lands."

The advanced psychiatric nurse practitioner should display key "**value-adding skills**" (Mellish, 1998:6) to facilitate the rewriting of problem-saturated stories through a team coaching intervention in this context. Based on suggestions of Mellish (1998:6–8), '**value-adding skills**' include **flexible and pragmatic process management, appreciative listening, practicing hope, being curious, facilitation skills** and **the ability to ask meaning-making or generative questions**. Based on the Theory for Health Promotion in Nursing (University of Johannesburg, 2009:8) assessment, diagnosis, planning, implementation and evaluation are inclusive to all strategies that are chosen to facilitate the mental health of managers. Conscious practicing of these '**value-adding skills**' contributes to **collaboration** with managers in this context (Visagie, 2002:109). Mellish (1998:7) identifies collaboration as an Appreciative Inquiry principle that facilitates growth, not only of managers, but also of the facilitator. According to her, facilitators keep developing interventions, process techniques and questions to enhance their own professional practice.

### 3.4.2 Programme Recipient: Management Team Involved In An M&A Change Process

The programme recipient (Dickoff, et al.1968:423) is described in Visagie (2002:109) as a **management team** consisting of operational managers who report directly to a general manager. In the context of the particular research it included operational managers from two teams based on the multiple descriptive case study design. According to Hubbard (1999:21), middle or operational management's concerns are more complex than that of the other categories of employees during M&A activities. He ascribes this viewpoint to the fact that operational managers do not only worry about their own job security, but about the well-being of reporting colleagues. Their expectations often remain misunderstood and are not addressed, which results in dissatisfaction. Thus, employees who report to them may also remain dissatisfied (Hubbard, 1999:23).

Operational managers are also responsible for integrating the two companies and driving the change process, while ensuring high levels of productivity. Hubbard (1999:23) describes them as the “engine” of the organisation, because they serve as the link between top management and the workforce. Being in a leadership position is inextricably part of their role as managers. The reality is, however, that being a good manager does not necessarily imply being a competent leader (Visagie, 2002:110).



### 3.4.3 Programme Context: South African Hospitality Environment

The **context** was defined as a specific South African property and hotel owning group engaged in M&A change, thus a **South African hospitality environment** in need of company culture integration (Visagie, 2002:111). M&A activities were – and still is – part of the company's future vision regarding growth. Stakeholders in this organisational context comprised of top management of the acquirer, the management team of the newly merged company, non-managerial categories of employees as well as customers. Even though the focus was mainly on a specific operational management team, the other stakeholders were implicitly included in the overall outcome of the activity.

### 3.4.4 Programme Motivation: Generating An Appreciative Learning Context

Data obtained from managers in this context gave evidence that they were constrained by problem-saturated stories related to the M&A process. A decrease in productivity and high levels

of stress followed as a natural consequence of experiencing an unstable organisational environment. Managers desperately tried to adapt by utilising unhealthy defence mechanisms, which resulted in stress leading to a process of disempowerment posing a threat to their mental health. An experience of being marginalised by an autocratic top management structure was described by managers. These realities complicated the transition process and posed a threat to sustained performance. It was therefore proposed that **preferred realities of managers should form the basis of transforming the context into an appreciative learning context** (Visagie, 2002:112). This was in line with Srivastva and Cooperrider's (1990:3) argument that organisations as "products of the affirmative mind", need "less fixing, less problem-solving and more appreciation".

### **3.4.5 Procedure For Programme Implementation**

The programme was described in relation to two core programme aspects, namely the **M&A orientation intervention** and the **M&A implementation intervention** (adapted from Visagie, 2002:113). These aspects represent the two programme stages. Basing my decision on literature that emphasises the need for intervention as soon as the deal is announced, I originally suggested the programme commence prior to the official takeover (Visagie, 2002:116). This stage was, therefore, called the pre-implementation stage, followed by an intervention that focused on the actual implementation and integration, namely the post-M&A team formation stage (Visagie, 2002:113).

The programme approach was underpinned by Appreciative Inquiry and group development theory (Srivastva & Cooperrider, 1990:3; Bush, 2001:3). According to an integrated version of these two theories, a management team is a socially constructed reality with the ability to create meaning through social dialogue (Visagie, 2002:114). Problem-deficit discourse results in problem-saturated realities, whereas appreciative dialogue fosters a mental health enhancing environment. Bush (2001:3) further distinguishes between pre-identity and post-identity group formation that influence the collective well-being of organisations. Refer to Chapter four in "Stories of Merger and Acquisition change: A team based approach in promotion of mental health" for a description of group development theory (Visagie, 2002:114).

It was further proposed that the programme should be anchored in M&A implementation principles to facilitate a smooth integration process, namely **orientation, planning,**

**collaboration, buy-in, management of expectations and ownership** (Visagie, 2002: 116/117). The time span for programme realisation was set as a period of one year to ensure sustained company culture integration (Visagie, 2002:117).

The **M&A orientation intervention** and **M&A implementation intervention** consist of primary programme activities that are realised through a 4-D Appreciative Inquiry approach (Mellish in Visagie, 2002:117). These activities include a **two-day celebration workshop and a three-day life skills coaching intervention**, followed by a **process of delivering operational performance indicators** through sustainability initiatives (Table 3.2). Each main activity is composed of different sessions with specific outcomes aligned to the overall outcome of “empowered team members supporting change collectively” within a context of mental health facilitation (Visagie, 2002:105).

An outline of the programme is presented in table 3.2, followed by a description of desired programme outcomes and implementation guidelines of the interrelated programme stages.

#### **3.4.5.1 Stage one: M&A orientation intervention**

This intervention signifies a well-planned merging of the two company cultures. Its main aim is to prepare managers for a meaningful M&A implementation process based on clear expectations as to how the merged entity will function (O’Reilly III & Pfeffer, 2000:66). It is the start of integration into the merged company, interlacing the two companies, systems, people and best practices (Grubb & Lamb, 2000:193). Grubb and Lamb (2000:191) make it clear that “culture clash is a predictable outcome” in the absence of a properly planned and executed merger integration. To avoid this pitfall, I conformed by embracing proper planning as anchor in this programme. Hubbard (1999:6) agrees that merging two companies successfully relies on a well-run, well-planned implementation process. Employees will be more receptive to the outcomes of an acquisition process, including negative ones, if they are psychologically prepared for it prior to its occurrence, and if they perceive the implementation process as fair (Hubbard, 1999:36).

The desired outcomes are:

- an ‘agreed to’ transition plan towards managing the change process as a team,
- a ‘mutually agreed to’ team vision, and
- an ‘agreed to’ set of operational performance indicators – best practice activities – to deliver to the merged company (Visagie, 2002:116).

**Table 3.2 Outline of an M&A team coaching programme to facilitate managers’ mental health**

Stage one: M&A orientation intervention	Stage two: M&A implementation intervention
<p><b>Two-day celebration workshop: Exploring strengths and appreciating the “best of what is”</b></p> <p><b>Step one: Discovery of new meaning in the midst of turmoil</b></p> <ul style="list-style-type: none"> <li>• <u>Session 1</u>: Selling the acquirer</li> <li>• <u>Session 2</u>: Tale of an M&amp;A change process</li> <li>• <u>Session 3</u>: Recall the best previous team experience</li> <li>• <u>Session 4</u>: Present your management style</li> <li>• <u>Session 5</u>: Share your personal and family history with a partner</li> <li>• <u>Session 6</u>: Reflect on your experiences of the change process so far</li> </ul>	<p><b>Step four: Deliver operational performance indicators through sustainability initiatives:</b></p> <ul style="list-style-type: none"> <li>• Managerial support</li> <li>• Creating a context of open dialogue</li> <li>• M&amp;A team coaching intervention</li> <li>• Celebrations and rituals</li> </ul>
<p><b>Step two: Develop a dream</b></p> <ul style="list-style-type: none"> <li>• <u>Session 7</u>: Envision a new team identity</li> </ul> <p><b>Step three: Design a new team character</b></p> <ul style="list-style-type: none"> <li>• <u>Session 8</u>: Design best integration practices</li> </ul> <p><b>Three-day life skills coaching intervention</b></p>	

In order to meet the desired **outcomes**, I proposed that the **M&A orientation intervention** programme should consist of two main activities as mentioned previously, namely a **two-day celebration workshop** consisting of different sessions based on facilitation of the first three “Ds” of Appreciative Inquiry, namely **discovery**, **dream** and **design**. This should be followed by a **life**

**skill coaching intervention** focusing on igniting intra- and interpersonal awareness. The last “D” – **deliver performance indicators** – ought to be the focus of attention of the second stage of programme implementation, namely the M&A implementation intervention.

**a) Two-day celebration workshop: exploring strengths and appreciating the best of “what is”**

The celebration workshop seeks to invite managers to become team players and to engage them in a process of shared meaning, celebrating the beginning of a new partnership between the acquirer and the target company. The overall aim of the celebration workshop is to design an operational plan to align the new team’s activities with that of the bigger organisation (Visagie, 2002:117). Additionally, the celebration workshop is believed to alleviate managers’ fear and uncertainty. Managers who come into a merged company undergo organisational socialisation, which means that they become familiar with the organisation’s values, norms, procedures and culture (Plunkett & Attner, 1997:659). During this phase, productivity is naturally low (Hubbard, 1999:28). By exploring strengths and appreciating the best of “what is”, managers are empowered to create new possibilities and hopes that may alter their behaviour positively and thus result in an increase of overall team productivity. This may also lay the groundwork for forming a meaningful psychological contract after adjustment in the merged company. In forming sustaining psychological contracts, both the employer and employees need to believe that the other is doing his or her part, based on a sense of fairness and equity (Plunkett & Attner, 1997:659).

The outline below presents suggestions regarding the practical implication of the first three “Ds” of the Appreciative Inquiry approach, namely discovery, dream and design as realised through eight interrelated sessions.

**a.i) Step one: Discovery of new meaning in the midst of turmoil**

This step is crucial for building meaningful relationships between managers and top management, while important information is disseminated for optimal performance. This step is implemented through six interrelated sessions, namely **selling the acquirer, tale of an M&A change process** and four sessions that focus on eliciting team dialogue regarding the best of “what is”, namely **recall the best previous team experience, present your management style, share your**

**personal and family history with a partner and reflect on your experiences of the change process so far.**

### **Session 1: Selling the acquirer**

The workshop commences with an information sharing session that is facilitated by the Chief Executive Officer of the acquirer. Incorporate information regarding the organisation's vision, mission, core values, culture, organisation structure, products, current operating priorities, commitment towards clients through a people-employee centred focus, and previous stories of success and failures (Bushe, 2001:13). Previous stories of success and failure provide the basis for organisational learning. As Dixon (*in* Noer, 1997:129) states, "The collective learns when it has available to it all information about the issue – not just the political correct view."

The Chief Executive Officer presents a draft integration plan to managers. According to Hubbard (1999:39) "... with uncommunicated intent, employees will form their own expectations without the acquirer's input. In these circumstances, it is likely that their expectations will be (skewed)." Emphasise the importance of incorporating managers' input during the course of the workshop to redefine the draft plan.

This presentation may be done by means of a visual presentation by either showing a video or doing a formal power point presentation. A meaningful way to give managers "hands on information" (Visagie, 2002:118), is to provide them with information manuals that include information regarding the acquirer's vision, mission and core values among others.

The session ends with a 30-minute open questioning time for managers to address their fears and uncertainties.

### **Session 2: Tale of an M&A change process**

The advanced psychiatric nurse practitioner, as an external team coach, presents the story of this research to the team, focusing on the dominant themes and recommendations that were made by participating managers. This is done to create a supportive environment encouraging team dialogue. O'Reilly III and Pfeffer (2000:64) write about special orientation sessions that involve employees from previously acquired organisations who offer their insights in assisting the integration process.

It may be done creatively through role play, involving sharing between the newly acquired managers and other management colleagues. Hubbard (1999:20) writes that when new employees perceive the acquirer understanding procedural and cultural differences between themselves and the target company, it results in more productivity and willingness to stay on in the acquired company. Acknowledging the painfulness of change is important. By retelling stories of an M&A change process that is based on this research, the facilitator aims to achieve a similar outcome, namely that the acquirer, through supporting this research, commit themselves to a better understanding of the influence of an M&A change process. It also aims at enhancing the trustworthiness and credibility of the acquirer by declaring “we’ve been there, we’ve done that” (Visagie, 2002:119).

The second session is followed by four sessions that aim to **elicit team dialogue regarding discovery of the best of “what is”**. The advanced psychiatric nurse practitioner facilitates an appreciative inquiry that centres on “stories of best team practices of the old team” (Visagie, 2002:119). The proposed sessions are embedded in the basic principles of group work and will progress through three phases, namely relationship building, working and termination. A description of these sessions follows.

### **Session 3: Recall the best previous team experience**

This session is based on stories of the best team practices of the old team and results in knowledge transfer of what may work best in the newly merged team. Each manager is asked in turn to reflect on his or her time in the previous company and to describe a story of a “best previous team experience”. The rest of the team is encouraged to be curious and to engage in dialogue with the manager who is sharing his or her story. When exploration of the “best experience” is exhausted, managers are requested to make a list and to reach consensus on the attributes of a winning team, thus summarising a common vision of the team at its best (Visagie, 2002:119).

An invitation to appreciate each other is implemented as closure of the session by requesting managers to acknowledge anything they have noted in others that are aligned to the listed attributes (Bushe, 2001:7/8). Bushe (1998:3) states that the “best team” Appreciative Inquiry is particularly appropriate for new teams and may help the team do important “norming” without having to go through “storming”. Team formation processes may be greatly accelerated with this intervention (Bushe, 1998:3). In this context it would also mean showing respect towards those



who may resist the change (Visagie, 2002:120). Maurer (1996:19) believes: “Successful change requires vision, persistence, courage, an ability to thrive on ambiguity, and a willingness to engage those who have a stake in the outcome”.

#### **Session 4: Present your management style**

The point of attention of this session is the discovery of managers’ strengths as company leaders. It includes the sharing of ideas about cooperative relationships, meaningful communication patterns and managers’ hopes as leaders in the merged company (Bushe, 2001:13; Mellish, 1998:2). A similar facilitation process, as above, is followed (Visagie, 2002:120).

#### **Session 5: Share your personal and family history with a partner**

Managers are requested to pair up with a partner and to engage in an interview to discover each others’ passions, interests and future dreams on a personal level. Common questions to ask include: What excites you as a person? Where do you see yourself going in this company? What are the “best things” that you have learnt in the context of your family? The partner gives feedback to the group about what he or she has discovered about the other person (Visagie, 2002:120). This session is based on appreciative interviewing.

#### **Session 6: Reflect on your experiences of the change process so far**

Art is used as a projective technique in this session to discover managers’ experiences of the change process so far. They are invited to draw a picture portraying their experiences of the M&A change phenomenon. Next, they engage in small group discussions focusing on emerging themes related to their experiences of the change phenomenon (Visagie, 2002:120). Noer (1997:242) writes about the value of “working through the pain and stress of immediate change and uncertainty.” He believes it lays the groundwork for revitalisation in the team. Bushe (2001:14) acknowledges the value of appreciating what is left behind in order to step forward into the future.

The above Appreciative Inquiry process grounded observations of the “best of what is”. The next step is to articulate collaboratively “what might be” through vision and logic, focusing on the consent of others in the system, based on “what should be” (Bushe in Visagie, 2002:120).

### **a.ii) Step two: Dream**

The second step of Appreciative Inquiry entails the creation of a results-oriented vision in an attempt to integrate the two organisational cultures. It includes a session that focuses on the creation or envisioning of a new team identity as described below.

#### **Session 7: Envision a new team identity**

The main outcome of this session is the generation of a team vision and mission in line with the organisational vision. This is based on provoking ideas about what are ideal and collaborative, thus sharing, affirming and coordinating efforts (Mellish, 1998:2). Managers are requested to pair up with someone that they know the least and to create two provocative propositions that reflect the “ideal” shape and practice of the merged team, such as creating a supportive environment for learning or positive working relationships (Mellish, 1998:3). This is based on creating a system of team values through team-building language that will extent team colleagues’ visions of new possibilities (Cooperrider & Srivastva, 1987:10).

A provocative proposition refers to an idea that is put forward for consideration, which deliberately aims at exciting other managers (Rooney, 1999:1509, 1515). These should be retold in the large group and grouped into themes like shared leadership, management or communication. Provocative propositions are grounded in the team’s collective positive organisational experiences, reflecting the “ideal” shape that they wish to establish in the merged company (Visagie, 2002:121).

Next, managers divide randomly in smaller groups and are requested to brainstorm ideal statements that would capture and define the spirit of the newly formed team (Mellish, 1998:4). Ideal statements are retold in the large group and consensus reached about a team vision of the newly integrated team, followed by a team mission statement. According to Cooperrider and Srivastva (1987:13), “The executive mind works largely from the present and extends itself to the longer-term future. It is powerful to the extent that it is able to envision a desired future state which challenges perceptions of what is possible and what can be realized ... Executive vision becomes common vision to the extent that it ignites the imaginations, hopes, and passions of others – and it does so through the articulation of self-transcending ideals ...”.

### a.iii) Step three: Design

Designing a new team character incorporates a session about “best integration practices” (Visagie, 2002:121) as described below.

#### **Session 8: Design best integration practices**

Managers are invited to work in small, self-selected groups to draft team-operating norms and performance indicators that will govern the post-acquisition integration process. Each manager is invited to recall images of “best integration practices” in their experience, and based on this input, norms are drafted and presented to the larger group (Bushe, 2001:14). Visagie (2002:121/122) suggests that performance indicators ought to include the following themes based on the recommendations proposed by managers who participated in the research:

- Decreased organisational insecurity
- Effective organisational communication practices
- Participatory management principles
- Cultural integration
- Dealing with resistance to change

A consensus discussion follows, facilitated by the advanced psychiatric nurse practitioner, in order to design a team integration action plan with starting and end dates and clear assignment of responsibilities to start realising destiny. Next, managers present their integration plan to top management to bounce ideas regarding the feasibility of performance indicators, as well as to align the integration plan to the overall company strategic plan (Visagie, 2002:122).

The second day ends with a ritual that mirrors managers’ hopes and dreams as a new team. A name-giving ceremony is held. Each manager is authorised to perform his functions in a symbolic way. This is a way of having fun as a team. Zimmer (in O’Reilly III & Pfeffer, 2000:5) states: “Most business practices repress our natural tendency to have fun and socialize. The idea seems that in order to succeed, you have to suffer ... I believe in an organisation ... where (people) see cooperative effort that is all around them ... When people feel connected to something with a purpose greater than themselves, it inspires people to reach for levels they might otherwise not obtain ...”.

## **b) Life skills coaching intervention**

A number of abilities are associated with team performance and success, including intra-personal and interpersonal awareness. With this in mind, I made the proposal in the original programme of focusing on a life skills coaching intervention during the following three days (Visagie, 2002:123–124). Noer (1997:174–176) writes about three levels of transition facilitation, namely personal, inter-personal and collective. He believes that to be relevant to the true needs of organisations, managers need to begin with their own transitions, focusing on intra-personal understanding. Life skills refer to basic developmental blocks of individual existence, linked to increased self-understanding (Broodryk, 2006:3). The primary tool for self-understanding is valid feedback. Secondly, managers must assist each other and reporting colleagues to let go of the past, and to refocus their self-esteem from where they work to what they do. This includes moving their attention from internal politics and relationships to helping serve customers. Skills to achieve this end include empathetic listening, the ability to give and receive feedback and to reflect feelings and emotions, coaching and counselling abilities and an operating model and a theory of transition. Lastly, organisational transition should occur (Noer in Visagie, 2002:123).

The same author contends that “Organisations of the future will not survive without becoming communities of learning ...” (Noer, 1997:176). According to Johnson and Drake (2000:1), “Staying resourceful, purposeful and motivated is key to top performance.” They argue that the on-going development of human potential is critical to business success (Johnson & Drake, 2000:1).

Relevant life skills coaching topics that should be considered for incorporation in this intervention are emotional intelligence, change management, stress management, leadership development, conflict management and communication skills (Visagie, 2002:123–124). In the M&A orientation intervention, the scene is set and preparations made for implementing the actual M&A implementation strategy that was refined through a process of collaboration with relevant stakeholders as described below.

### **3.4.5.2 Stage two: M&A implementation intervention**

The second stage, namely the M&A implementation intervention, represents the beginning of the actual implementation phase. Continuous integration forms an integral part of this stage. The findings of this research reflect that managers start to accept the change after about one year.

The M&A implementation stage therefore starts on day six and ends after a period of one year, when its overall effectiveness will be evaluated (Habeck, et al. 2000:5; Visagie, 2002:124). Evaluation and implementation of change initiatives are, however, seen as ongoing processes.

**a) Step four: Deliver operational performance indicators through sustainability initiatives**

The last step is integrally linked to the second stage of programme implementation, namely the **M&A implementation intervention**. The emphasis is on continued action planning, operationalising of implementation strategies and sustainability of change. Managers should be made aware of the importance of driving the integration strategy in a context of managerial support, complemented by a position of ownership.

This stage entails implementing and managing the M&A change process on an ongoing basis. The focus remains on strengths rather than on deficits, and on building a unifying work culture that stresses organisational values. The overall aim of this phase is to accompany managers **to sustain change** and **to deliver performance indicators**. This will be facilitated at different levels and by using different sustainability initiatives within a context of M&A team coaching. This programme strives for a paradigm shift that will cause the team's character to become one of courage, hope and performance through continuous development of individual and collective potential (Visagie, 2002:125).

In order to sustain change and to deliver performance outcomes, proposed objectives of this phase follows below:

- Working towards a common culture
- Developing a post-team identity
- Delivering best practice activities
- Maintaining or exceeding goals
- Establishing meaningful communication practices

Findings of the previous research dictated that top management should invest in the following sustainability initiatives to sustain the change, such as **managerial support, creating a context of open dialogue** and **continuous development of team potential** through an ongoing **M&A team coaching intervention** and regular **celebrations and rituals** (Visagie, 2002:126–129).

**Managerial support** refers to top managements' involvement in the proposed M&A team coaching programme. The findings of the research point to the need to engage top management in business coaching to promote their ability of living organisational values and practising a participatory management style. They should further be more visible during the implementation stage and refrain from using distance-inducing status symbols, such as separate dining areas, reserved parking spaces and secluded office suites (Visagie, 2002:126). Noer (1997:168) agrees that distance-inducing symbols adversely influence managers' perception of top management.

**Creating a context of open dialogue** reflects managers' request for influential conversations that build trust and encourage collaboration through timely, adequate information sharing and feedback sessions (Visagie, 2002:127). Open dialogue should commence during the M&A orientation stage while it continues throughout the M&A implementation stage as a measure to facilitate managers mental health in a context of company culture integration.

**Continuous development of team potential** was envisioned through ongoing M&A team coaching sessions. I pictured these sessions as a way of using the M&A opportunity to create a context of continuous renewal and growth, as well as to develop team potential and to assist managers to meet personal and operational goals (Visagie, 2002:128). I stressed the fact that top management should be involved in the generation of this programme to ensure buy-in (Visagie, 2002:128).

**Celebrations and rituals** denote consistent personal and collective recognition in a context exposed to M&A change (Visagie, 2002:128). Examples of celebrations and rituals include award giving ceremonies such as employer of the month and team of the year awards.

For a detailed description of the initiatives to sustain change in this context, consult Chapter four, Stories of Merger and Acquisition change: A team-based approach in promotion of mental health (Visagie, 2002:126–129).

#### **3.4.6 Outcome Of The Programme**

The **outcome** of the programme was envisioned as “**productive and empowered team members that support the change process collectively**” based on a process of mental health facilitation (Visagie, 2002:103).

### 3.5 SUMMARY

The end of this research was merely the beginning of new research stories to be told. In this Chapter, I provided you with an overview of the “old” research story with reference to the objectives, research design and method, findings and emerging programme implementation guidelines. An account of the “new” research story starts in the next chapter, focusing on a description of the findings of the situational analysis to establish programme applicability.



# Chapter 4

## DESCRIPTION OF THE FINDINGS OF A SITUATIONAL ANALYSIS TO ESTABLISH PROGRAMME APPLICABILITY

*“At the boundary life blossoms.”*  
(Gleick in Cooper & Sawaf, 2000:224)

### 4.1 INTRODUCTION

This Chapter is concerned with a description of the findings of the situational analysis that I conducted as part of the first phase of the research to establish programme applicability. Firstly, I present a synopsis of the research process relevant to this phase. I then portray the background context situating the research in the real life context of managers as the key stakeholder group. Thirdly, I describe the execution of fieldwork activities and data analysis. Finally, I present the findings of phase one. I aim to provide clear argumentation as to why this programme was deemed applicable in the specific context.

### 4.2 SYNOPSIS OF THE RESEARCH PROCESS GUIDING THE SITUATIONAL ANALYSIS

The findings of my previous research, entitled: “Stories of Merger and Acquisition change: a team-based approach in promotion of mental health,” served as a framework to establish programme applicability (Visagie, 2002:54–100). This meant that I had to find out if the earlier generated M&A team coaching programme would serve the information, learning and contextual needs of the key stakeholder group (Preskill & Catsambas, 2006:44). Programme applicability in this context referred to evidence indicating the programme could be transferred to this setting based on the degree of similarity or goodness of fit between the different contexts (Lincoln & Guba, 1985:297). I therefore entered the context with the intent to establish if managers’ experiences of the cross-cultural M&A matched the findings of my former research. I realised that the uniqueness of the setting and the key stakeholder group might elicit divergent views regarding managers’ experiences of the cross-cultural M&A. Obtaining information regarding managers’ recommendations for improved M&A implementation practices was, therefore, seen as crucial to address potential differences in the findings of the two research projects.



## **4.2.1 Background Context**

The description of the background-context that follows includes an account of how I gained entrance into the research field, as well as the process and outcomes of my first two meetings with the management team. This is situated against the unique context of the setting.

### **4.2.1.1 Entering the field**

The substantive research context, referring to the organisational context that hosts the stakeholders being studied (Johns, 2001:32), represented a Southern African property and hotel owning group who acquired a 104-bed hotel located in the Kingdom of Swaziland. The hotel belonged to the Swaziland Government, but was leased by the aforementioned hotel owning group, representing the acquirer in this research. The hotel was taken over by the acquirer in December 2002. The previous leasing company was also of South African origin. The takeover was fuelled by financial constraints experienced by the previous leasing company and numerous delays in the acquisition process complicated the takeover. The process had begun more than a year prior to the final settlement. The Government was a crucial stakeholder in the acquisition process. The acquisition represented a cross cultural M&A as defined in Chapter one (1.5.3.1).

My first encounter with the hotel and its people was on a warm summer's day in the middle of February 2003. It was my first visit to Swaziland. I was accompanied by Annie, a field worker, who assisted me with data collection during this phase of the research. It was about two and a half months after the official announcement of the acquisition. I vividly recall the brightness of the day. As we crossed the border separating South Africa and Swaziland, my feelings of expectation vacillated between excitement and fear. On the one hand, excitement and gratitude for the amazing opportunity to gain entry into the research field and to enter the worlds of research participants, as well as to grow in my role of a researcher and team coach. On the other hand, fear of the unknown and ambiguity about fulfilling these roles. Many questions echoed in my mind. It was the beginning of crossing many borders. Not only physical in nature, allowing me to enter a foreign country, but also personal, intellectual, relational and cultural.

Gaining access to the field was relatively easy as the acquirer's Director of Organisational Behaviour had identified the need for such a programme. I realised, however, that gaining the

trust and building rapport with other relevant stakeholders such as the management team and the General Manager would be crucial to ensure trustworthy findings.

We followed a twisted asphalt path through kilometres of green hills. Eventually we saw a name board directing us to the hotel. A sturdy building awaited us at the end of the bumpy tar road, nestled in pine woods. Front office staff welcomed us “home” as if they had known us all along. We only learned afterwards that the greeting, “welcome home” was the standard way of greeting guests.

We met with the General Manager first. He shared his account of the takeover events with us and provided more information about the management team that we would soon meet. He also enlightened us about the current theme of loss in the context related to the human immunodeficiency virus/acquired immunodeficiency syndrome (HIV/AIDS) pandemic in Swaziland. De lonno (2006:42) points out that the AIDS situation is catastrophic in Swaziland with an estimated one-third of the population debilitated by HIV/AIDS.

In my personal field notes I reflected on this meeting as follows: *“We found our conversation with (the General Manager) ... informative and meaningful. Listening to his hopes and dreams for this new venture was encouraging, and we were touched by the stories of loss that unfolded...”*

**a) Meeting the management team: Field work activities**

The field work activities involved two meetings with the management team in a two week period portraying my desire for prolonged field engagement. The outcomes of these meetings were envisioned as building rapport with the team. Summarised versions of the process and outcomes of these meetings are described next.

**a.i) First meeting with the management team: Building rapport and obtaining informed consent**

Annie and I met with the selected managers a day after our initial conversation with the General Manager. These managers were purposively selected and included all operational managers at the hotel, thus representing a management team in this context. The team consisted of six men and one woman between the ages of 29 and 55. Their designations included: personnel officer,

front office manager, executive housekeeper, food and beverage manager, executive chef, financial controller and maintenance manager. The prospective participants (managers), with the exception of a 29-year old Afrikaans speaking South African resident, were from Swaziland. They were SiSwati speaking with proficient English writing and oral skills.

Six of the seven managers were present during the first meeting. The 29-year old financial controller was absent due to personal obligations. He was not only the youngest member in terms of age, but also in terms of team membership. He joined the company during the same month that the takeover took place (December 2002). Annie and I engaged him in an individual conversation the following day. We obtained his informed consent for research participation and encouraged him to share his experiences of the cross-cultural M&A during this conversation.

The main purpose of the initial meeting was to get to know managers in order to start building a relationship of trust essential for establishing credibility of the research. The secondary aim was to invite managers as prospective research participants to collaborate in the research process; to inform them of the preceding research endeavour (Visagie, 2002) and to commence with the situational analysis through generating relevant data mainly in the form of field notes.

The meeting took place in a conference room. The chairs were placed rectangularly around adjoining tables. The tables were covered with white tablecloths and black overlays. Accessories included an overhead projector and a white board for notes. Water jugs, cold drinks in glass tumblers, drinking glasses, peppermints in small glass containers, as well as paper and pens, decorated with the new company logo, completed the picture.

After I had introduced Annie and myself, I shared the proposed agenda with the team, namely “to bounce ideas about your experiences of the current change process in the unit”. An explanation of the future use of the two self-reporting data collection methods, namely completing a naïve sketch and participating in a focus group, followed. A narration of the story of the previous research was a crucial aspect of inviting managers to participate in the research (Visagie, 2002). This research decision was based on the story-telling nature of African cultures. The session involved a 30-minute power point presentation commencing with the following scene-setting statement: “The purpose of this presentation is to share with you the stories and experiences of people who were exposed to a similar change process in two other hotels belonging to the same company”.

The following points were addressed during the presentation:

- Background to the preceding research focusing on the problem statement, namely the high failure rate of M&As integral to the human consequences of this phenomenon on work-related performance.
- Research questions that directed data collection, namely how did employees experience the impact of an M&A change process and how could a process of M&A change be facilitated in order to promote their mental health?
- Findings focusing on the main themes described in Chapter three (3.3), namely problem-saturated stories of M&A change resulting in a process of organisational disempowerment threatening managers' mental health, alternative stories of M&A change based on a viewpoint of "*change leads to growth*", paradoxical experiences of the change process indicating different realities to a similar change process and, finally, recommendations that were made to promote constructive future M&A change processes in the company.
- The presentation concluded with a copy of a drawing made by a former participant of his lived experience of an M&A change process. This drawing formed part of the data generated at that point in time to allow for the expression of context-specific experiences of the M&A change process (Appendix 9).

This was followed by the facilitation of a group discussion about the shared information. I did not audio-tape the conversation as informed consent to participate in the research had not yet been obtained.

Verbal and non-verbal cues of underlying anxiety were noted during the discussion, for example, restless body movements, silences and externalising statements. Externalising statements refer to managers' tendency to refer to the third person during dialogue like "*these people*" and "*they*". We learned in our initial discussion with the General Manager that employees were on a three-month probation period at the time of this meeting. This explained the early observations of anxiety and perceived distrust in their interactions with us. This was further confirmed by data generated from the naïve sketch, as well as by information received from the focus group during the second meeting with the team. Transcripts of the qualitative interviews conducted during phase two of the research also confirmed this observation of early anxiety and distrust. A manager, when referring to the initial contact, stated: "*We were thinking, what is this research...?*"

Ethical aspects were considered next. Managers were informed of ethical considerations that would guide the research process as discussed in Chapter one (1.8). They were also invited to clarify unanswered questions regarding the proposed research. This part of the session ended with tea and snacks. It gave me the opportunity to meet managers informally. Informal interactions were seen as a valuable source of field data throughout the research process. Patton (2002:285) supports this view by warning: “If observers put away their seeing and observing selves as soon as a planned, formal activity ends, they will miss a great deal of data.” In an attempt to “stay open to the data,” I watched, listened and looked at the interactions between managers, as well as between them and us (Patton, 2002:258). I noted that one manager in particular, who appeared quiet during the group discussion, reached out during this time by telling me more about his operational realities regarding the change process. I reflected in my field notes that it seemed as if he felt safer to share on an individual level rather than in the group context.

Annie and I departed from the context with an invitation to the managers to consider research participation, informing them that we would return after two weeks to commence the data collection process with their informed consent.

#### **a.ii) Second meeting with the team: Formal data collection process**

Most managers appeared more relaxed in their interaction with us when we commenced with the formal data collection process two weeks later. The South African manager was away for the weekend and did not participate in the data collection process. As mentioned above we had an informal data collection conversation with him during our first visit to the context. The demographic profile of the managers remained the same throughout the data collection process (4.2.1.1. a.i).

I invited the six managers present to complete a naïve sketch, after which they participated in a 90-minute focus group exploring their experiences of the cross-cultural M&A and their recommendations for proposed programme improvement. The six naïve sketches were returned and the verbatim transcribed data of the focus group were complemented by field notes in the form of observational, methodological, theoretical and personal notes. Tesch’s descriptive method of open coding (Creswell, 1994:154– 155) guided the data analysis process pertaining to all the collected data sources (naïve sketches, focus group and field notes). See Chapter two for

a comprehensive description of the data collection and analysis method utilised in this phase of the research process (2.4.1.5 & 2.4.1.6). A sample of the triangulated data collected during this phase of the research process is presented in appendix 5.

Our second meeting with the management team ended with a programme discussion focusing on the logistic aspects of the intended M&A orientation programme, such as dates, accommodation and preferred future modes of communication, such as the electronic media and telephonic communication.

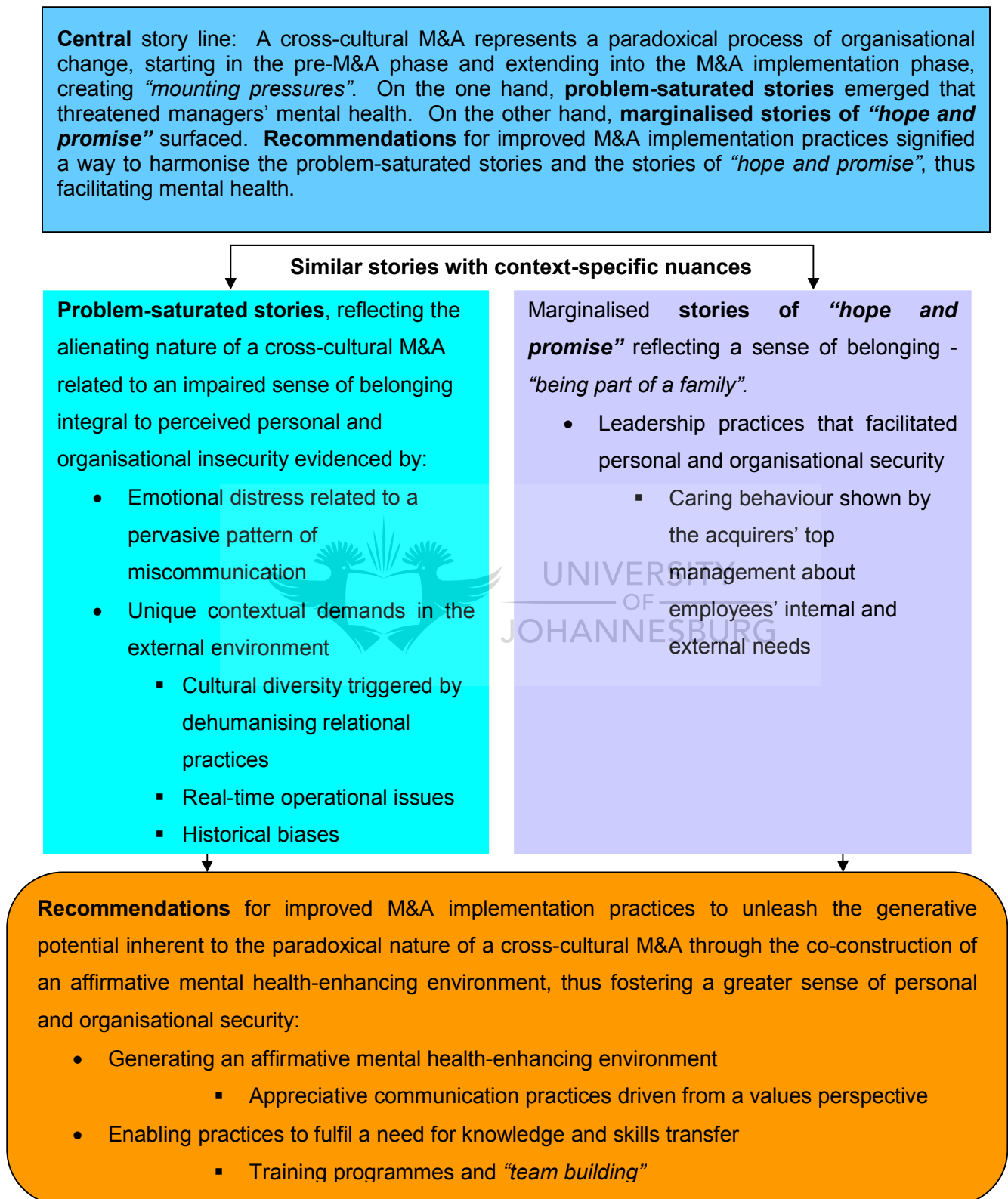
### **4.3 DESCRIPTION OF FINDINGS**

Managers' experiences of a cross-cultural M&A are consequently described in a narrative way. A literature control was used to re-contextualise context-specific perspectives within existing literature where I deemed it crucial to provide the reader with more theoretical clarity. The ultimate aim was not to conduct an in-depth literature control at this stage, but rather to verify the findings of this research phase with the findings obtained in my former research, in order to establish programme applicability (Visagie, 2002:57–99).

Themes that related to the findings of my previous research indicated that managers would benefit from implementation of the programme. However, accounts that reflected context-specific experiences suggested the need for possible programme alterations where managers were concerned. I was aware of the possibility that managers might have had experiences that would oppose the findings of my former research. If this happened, it would have meant that the programme was not applicable to the context. One course of action in such a situation might have been to select another target audience. A second, probably more appropriate and practical course of action might have been to generate a new programme that fitted the needs of the participants that were part of the research up till then.

The findings, represented in figure 4.1 are described with reference to a central story line, themes and sub-themes. Each of these aspects is evidenced by supported citations, in *italic writing*, that represent the experiences of the participatory team.

**Figure 4.1 Overview of the central story line, themes and sub-themes described by a management team of their experiences of a cross-cultural M&A**



#### 4.3.1 Discussion Of The Central Story Line Of Managers' Experiences Of A Cross-Cultural M&A

The **central story line** gave an account of a cross-cultural M&A as a **paradoxical organisational change process** that started in the pre-M&A phase and extended into the post-M&A implementation phase, creating "*mounting pressures*". A manager voiced the following: "*the changes had lots of both negative and positive experiences*". On the one hand, **problem-saturated stories** revealed the alienating nature of the cross-cultural M&A, fuelling an impaired sense of belonging in the workplace. A deep sense of personal and organisational insecurity underpinned these adversely perceived experiences, ultimately resulting in a parallel process of disempowerment threatening managers' mental health, illustrated by the following reflection: "... *you can imagine all these seeds when they are sown, what they do to human life*". On the other hand **marginalised stories** of "*hope and promise*" emerged. These alternative, yet marginalised stories of "*hope and promise*" focused attention on managers' need for organisational fit and belonging, facilitated by practices that were perceived as fostering a sense of personal and organisational security central to the need of "*being part of a family*".

Risberg (1997:260) confirms the paradoxical nature of employees' reactions to M&A activities. Marks and Mirvis (*in* Risberg, 1997:260) label this phenomenon "the merger syndrome". According to them, this syndrome is triggered by "a combination of uncertainty and the likelihood of change, both favourable and unfavourable, that produces stress and, ultimately, affects perceptions and judgements, interpersonal relationships and dynamics of the combination itself" (Risberg, 1997:260). Whether a person is a manager or an employee in the acquired company, the possibility of the acquisition resulting in stress, ambiguity, anxiety, disorientation and confusion for every individual, exists, and originates from the unsettling of ordinary life conditions (Buono & Bowditch *in* Risberg, 1997:261; Sinetar *in* Risberg, 1997:261).

Charles Handy (1994:12) argues that paradoxes have always been part of organisations. Managing paradoxes are therefore a key competence in organisations that embrace change. The more complex the world, the more paradoxes emerge which are "like the weather, something to be lived with, not solved ... Paradox I now see to be inevitable, endemic, and perpetual. The more turbulent the times, the more complex the world, the more paradoxes there are ... Paradox has to be accepted, coped with, and made sense of, in life, in work, in the community, and among the nations" (Handy, 1994: 12–13).



The **paradoxical nature of the change process** in this research did not solely refer to a simple, dualistic grouping of “*negative*” versus “*positive experiences*”. M&A processes are known to be complex phenomena (Risberg, 1997:257). The paradoxical character of the change phenomenon thus includes the dualistic “negative” versus “positive” dichotomy, as well as other more subtle forms of contradictions noted in language patterns. Different sources of evidence obtained from the naïve sketches, focus group transcript and the field notes reflect different realities about the same phenomenon (experiences of a cross-cultural M&A) at times. A manager shared, for example, that while “*some people had nowhere to go*” others were “*excited at getting a package*”, reflecting on the contradiction of an impaired future vision versus short-term relief. It was also mentioned that “*some staff were for the takeover (while) others were not for the takeover*”. It was further noted that managers contradicted themselves from time to time as demonstrated by incongruent verbal and non-verbal messages. Maurer (1996:25), in his reflections on change and resistance, describes this paradox by referring to the Chinese symbols “yin” and “yang”. He points out: “Change moves into resistance, resistance into change. Nothing is constant ... transformation can occur if we are willing to be part of the process” (Maurer, 1996:25).

The last theme, namely **recommendations** that were proposed by managers for **improved implementation practices** in a context of a cross-cultural M&A, signified a way to harmonise the problem-saturated stories and marginalised stories of “*hope and promise*”, by unleashing the generative potential inherent in the paradoxical nature of a cross-cultural M&A, thus facilitating mental health. Mental health facilitation was intrinsically linked to the co-construction of an affirmative mental health-enhancing environment that would foster a greater sense of personal and organisational security.

Thatchenkery (*in* Cooperrider & Avital, 2004:77) argues that the modernistic approach of dealing with paradoxes has been to find ways of resolving them. Within a post-modern paradigm, underpinned by Social Constructionism, an alternative approach evolved, namely to affirm and accept paradoxes through a process of Appreciative Inquiry. According to the Theory for Health Promotion in Nursing (University of Johannesburg, 2009:4), mental health facilitation implies the “mobilisation of resources”. These recommendations would thus be used to mobilise internal and external resources during programme implementation in order to generate the transformative potential of the change, as well as to construct qualitative pointers against which the programme could ultimately be valued.

The **central story line** described above, correlated with the findings of my previous research (Visagie, 2002:58–60). Qualitative differences in the findings of these two research projects could be ascribed to the contextual differences between the different research settings and stakeholders. The narrative account that follows presents a description of similar stories with context-specific nuances, meaning that similar and unique experiences are integrated into a consolidated picture.

#### **4.3.2 Problem-Saturated Stories That Reflect The Alienating Nature Of A Cross-Cultural M&A**

The **problem-saturated stories** told by managers revealed practices, events, beliefs, perceptions, attitudes and feelings that support the **alienating nature of a cross-cultural M&A**, commencing in the pre-M&A stage. A participant mentioned that *“rumours ... that the outgoing company were not doing okay”* started *“earlier that same year”*, resulting in a deep sense of personal and organisational insecurity, reflected by comments such as: *“all of us ... couldn’t know what was going wrong”* and *“people were not sure what was going to happen”*. A process of isolation unfolded that impaired managers’ sense of belonging, as well as their mental health. The need to belong, in this context, was illustrated by participants’ use of the *“family”* metaphor, evidenced by the following quotation: *“we were not part of the ... family image”*. Mental distress was evident in the description *“people were involved in lots of stresses”*. A process of personal and organisational disempowerment transpired feeding the *“loss of future hopes”*. Seo (2007:18) confirms that anxiety and uncertainty related stress is expected to be considerably higher in the pre-merger stage, and leads to speculations that increase *“employees’ uncertainty and anxiety about ‘me’ issues”*.

**Personal and organisational disempowerment** in this context referred to the outcome of unhealthy interactions between the internal and external environments of managers during the cross-cultural M&A. On a personal level, unhealthy interactions threatened managers’ mental health. On an organisational level it influenced the emotional, mental and behavioural responses of managers to change, resulting in troubling interpersonal relationships and impaired operational efficiency.

These unhealthy interactions were verified by two sub-themes that support the problem-saturated stories of the cross-cultural M&A in this context:

- Emotional distress related to a pervasive pattern of miscommunication
- Unique contextual demands in the external environment

#### 4.3.2.1 Emotional distress related to a pervasive pattern of miscommunication

**Emotional distress** was reflected by managers' descriptions of feeling **fearful, ambiguous, undervalued, frustrated, under-trusted** and with **impaired confidence** about the impending event, their future and their relationship with the self and others. **Fear** and **ambiguity** were integral to the change process. Managers described the change as a frightening experience that escalated to the different categories of staff. The present, as well as the future, appear to be uncertain and ambiguous associated with a **pervasive pattern of miscommunication**. A manager shared the following: *"I was not sure of the new company, since it was my first to hear about them"*. Another added that *"people were not sure what were going to ... happen"* and they wondered *"are we going to cope?"* In the perceived turmoil created by the takeover, the pervasive pattern of miscommunication prevailed.

The top management of the outgoing company apparently neglected communicating with the management team about the acquisition, or provided **ambiguous communication**, confirmed by the following statement: *"... for three months we did not know who the employer was"*. Managers described themselves as a buffer between *"upper management"* and the *"staff behind"* them adding to the mental discomfort. They felt obliged to *"filter things that went through to line staff"*. Inadequate information distribution robbed them of their voices, creating feelings of personal failure in their relationship with the self and others. Communication seemed to be a daunting task in this context as evidenced by: *"convincing people was difficult ... to change the minds of the lower staff"*. A manager commented: *"They (reporting colleagues) wanted to know about the oncoming company, yet there was no knowledge about them. It was like ... you will see once you're there"*. Another one agreed that *"... it was difficult because it was still not our hotel but we had to make decisions ... we couldn't consult with the staff so it must have been very confusing ... one side saying, almost with secrecy ... there were a lot of politics"*. It was further mentioned that: *"they (reporting colleagues) were coming to me all the time and say, 'What it is that, what is this?'...we tell them, 'no let's wait and see because we are...told that they are not going to retrenching anybody...but people were not sure what is going to happen"*. Managers' perceived

inability to distribute accurate information to all categories of staff created space for many unanswered questions.

In a context of uncertainty managers felt **undervalued** related to the communication processes displayed by both the acquirer and the outgoing company. They further expressed an experience of failure in their relationships with reporting colleagues based on a personal position of **impaired confidence** about the impending event and the future. **Limited access to information**, both from the outgoing company and the acquirer was described by a manager as follows: “... *there was no proper feedback ... we've had two situations, dealing with the outgoing one, yet you need to know about the oncoming one*”. Another manager agreed that “*communication was not 100% as we did not talk to the new company directors...and the old company kept on saying: 'We do not know' when a question was asked*”.

The **pervasive pattern of miscommunication** between managers and organisational stakeholders of both the outgoing and incoming company, triggered a sense of alienation evident by statements such as “*the staff was divided due to the break-up of communication*” and “*we were more like adopted kids*”. The resulting influence on managers' mental health was clearly demonstrated by the following quotation, calling attention to the implied psychological discomfort related to miscommunication in this setting: “*...I suffered ... everything was just a misunderstanding. I could not know what to do because I had to get solutions, but where to get it, nowhere...*”.

In the absence of effective communication from informed parties, managers and other employees at the hotel experienced a **lack of significant information distribution**. Consequently, they listened to rumours, made an attempt to reduce the resultant feeling of being undervalued, and tried to provide their own answers to the ambiguity of the situation. This added fuel to their level of fear and frustration, ultimately contributing to an experience of personal and organisational insecurity, verified by: “*What really make people afraid is not knowing and entertaining rumours.*” There were also rumours about “*staff count*” and “*rumours of retrenchments*”, such as: “*It was said that the company will retrench about 30 staff members; it was said that they shall bring about 6 new heads of departments*”. Finally, “*rumours were spread that he (the acquirer) was dishonest and new to the industry ...*”. Rumours indicate how **language constructed realities** that were detrimental to the mental health of employees, starting in the pre-M&A phase already.

Managers' **desire for clear communication** was reflected in the personal field notes I made after our first meeting. I wrote: "*n Groot behoefte aan duidelike kommunikasie en inligting ten opsigte van die oriënteringsprogram is geïdentifiseer*". ("A huge need regarding clear communication and information about the orientation programme was identified"). The team's request for adequate information portrayed a need to be valued as part of their here and now realities.

**Feeling under-trusted** seemed like a natural consequence of fear, ambiguity and miscommunication against the background of multiple agendas, paradoxes and perspectives. Managers were confused by "**conflicting messages**" received from the acquirer as well as the outgoing company. They felt under-trusted, and reacted with behaviour indicating distrust in both the acquirer and the outgoing company. These "*conflicting messages*", even though ascribed more to the outgoing company, also featured in the acquirer. A manager commented on the "*criticism from all angles. I would hear this side of the outgoing company and I would hear that side of the incoming company.*" "*Uncertainty was forced*", is how a manager described the influence of this situation on his mental health.

Managers also described "**conflicting messages**" pertaining to communication regarding **retrenchments** specifically. An external environment characterised by "*job instability*" emerged. The acquirer, as well as the Government, apparently conveyed the message that staff would not be retrenched initially; however, staff discovered that certain positions were advertised in local newspapers at a later stage. The following quotation supports the initial promises made by Government: "*At leasing stage the Government had assured all that they will retain their jobs ...*". When managers consequently found evidence that certain positions had been advertised, it triggered **disillusionment** and **fear**, especially behind the backdrop of the "*three month probation period*". A manager reflected on the realisation that positions were advertised: "*...I started looking at the paper and I saw positions, then I thought if they want somebody for F&B [Food & Beverage] then it means X is going*". Another one stated: "*Advertisement of positions ... made me scared because we thought how could they advertise such positions unless they know that we are not capable ... they are going to get rid of us ... we did not trust the new company at all and thought they had hidden agendas*". **Fear** and **ambiguity** related to this behaviour of the acquirer is also clearly evident in the following quotation: "*I was a bit scared that if the people do say we must re-apply, maybe they would not want older people (40 and above), but at the same time I*

*thought if they want this to work then they must have older people with experience and so on and I was like 50/50”.*

It sounded as if managers were somehow caught in the paradox of “*what we have got ... (and) what we are going to have*”. The need to know versus ambiguity in both the internal and external environments of managers emerged as yet another paradox. A manager said: “*You had to be sure about your future*”, yet, “*you couldn’t plan for the future*”. The “*new*” versus “*old*” company dichotomy was well and alive in the dialogue that transpired as part of data generation. Managers expressed this dichotomy by referring to the “*outgoing company*” versus the “*incoming company*”, “*company A*” versus “*company B*” and the “*new company*” versus the “*old company*”.

An added dimension of **distrust** was the perception that the outgoing company had ulterior motives. It was believed by some that “*they (the outgoing company) were trying to set us up to fail...*” and “*stalled the takeover*” because “*the outgoing management were not willing to go...*”. Perceived “*belittling*” messages added to the sense of personal and organisational disempowerment, reflected by an **impaired sense of confidence**. **Personal vulnerability** related to these experiences is noticeable in the following two quotations: “*We were not sure whether the old company has already said a lot of things about us and our files ... they also wanted to portray us as people who did not know their jobs*” and “*the outgoing company were moving around ... belittling the newly appointed taking over company ...*”. **Frustration** emerged in relation to these realities: “*The outgoing company tried to hinder the new company performing their duties ... this was very frustrating, resulting in “doing crisis management and damage ... prevention”.*

**Ambiguity** and **distrust** were further encouraged by delayed due diligent factors, evident in: “*I never thought that the ... incoming company was going to indeed take over because of the delayed factors*” and “*the staff was not exactly sure what is actually happening*” due to “*agreements that had not been signed off*”, as well as “*...some disagreements over certain industrial relations clauses...*”.

A **wide range of corresponding emotions**, shaped by managers’ interactions with an external environment experienced as unsafe, emerged. These emotions were anxiety (“*staff was anxious due to info received from the previous company...*”), anger which was not only reflected in the stories shared, but also in the voice tonality in which some statements were made (“*you need to prove yourself the whole time...*”), confusion (“*it must have been very confusing*”), sadness

related to the anticipated loss of staff (“...can you imagine your support staff being dragged away, so where is life?”) and “loss of future hopes” (“some people have nowhere to go...”). These emotions additionally supported the emerging **emotional “distress”** in the internal and external environments described by managers. Akiskal (2009:4) links mental distress to sadness, stating that it is a universal human response to defeat, disillusionment or other adversities. This response has adaptive value in an evolutionary sense, “by permitting withdrawal to conserve inner resources, or it might signal the need for support from significant other”.

In an attempt to maintain emotional equilibrium **resistant behaviour** unfolded in the form of mental defences. **Blaming behaviour** was pertinent. It seemed as if managers deemed it safer to blame “the Government” and the “outgoing company”, while they empathised with the acquirer. Blaming behaviour is reflected in a perception that “... Government had not done enough to investigate the company...”, as well as that the outgoing company “set us up to fail”. On the other hand, **rationalising** – as a mental defence mechanism – was evident by managers justifying the acquirer’s “aggressive” approach based on the observation that “...aggressiveness was necessary, on the level of damage that had happened to correct that abnormality; they needed ... that approach”. **Verbal empathy** with the top management of the acquirer is also apparent in the following comment: “we don’t think they are to blame ... the time they planned for the takeover was very appropriate ... they had enough time to prepare for the festive season, enough time to liaise with the suppliers and to put operations in order. Enough time to train the staff and prepare them for the change, implementing the procedures and all the like ... if they were given enough time they would have done it much better than they have”.

**Externalising language** further substantiated **psychological discomfort**. Most quotations indicate that managers did not refer to themselves in the first person, but used the words “we” and “us”, also evident in the following citation: “These people have fears (of the unknown)...” instead of saying, “I am fearful”. Discrepancies in verbal and non-verbal messages at times also confirmed psychological discomfort. A manager would defend the acquirer’s perceived “aggressive approach ... considering the level of damage that has taken place”, but would also mention in an angry tone that “they needed to approach this in a very aggressive situation, but one thing I am not happy with...”. A relevant question related to the mental defences displayed by managers unfolded as: How safe did the team feel to share information with us as researchers in this early stage of data collection?

#### 4.3.2.2 Unique contextual demands in the external environment

**Unique contextual demands in the external environment** referred to cross-cultural M&A experiences that mirrored context-specific nuances, meaning that this theme represented qualitative differences when compared with the preceding research. Three sub-themes emerged based on the perceptions of the management team, namely **cultural diversity triggered by dehumanising relational practices, real time operational issues** and **historical biases**.

**Cultural diversity triggered by dehumanising relational practices** emerged as a problem-saturated story in this context. Words used to describe the relationship with the acquirer, as well as the outgoing company, reflected an “*us*” versus “*they*” comparison, reflecting **cultural diversity**. The M&A process indicated two different corporate and national cultures merging and one unbundling in the case of the outgoing company. The management of the outgoing company was portrayed as displaying **dehumanising relational practices** during the time that they worked in this context. These practices were demonstrated amongst others through behaviour that emphasised the differences in national culture and language. An experience of **exclusivity** was fostered, aggravating managers’ perceptions of an impaired sense of belonging, and confirming their alienation. The following account substantiates this statement and relates to an **impaired sense of belonging**: “...*the other family* (outgoing company) *would change into their language ... can you imagine the whole environment? We are not hearing a thing ... you come and make a request ... they would start conversing in their own language, you know how much irritating that is ... there you are waiting, you want to hear feedback from that particular person, they start looking at each other, communicating in their mother language, they start laughing and you just stand like a fool*”.

The relational message underlying this account was clear, “you don’t belong, you don’t meet the criteria of belonging, so we are going to keep you out” (Goldberg, 1994:12). Goldberg (1994:12) warns about social behaviour that indicates that “those deemed different are not part of the social formation, are not included under values of moral treatment, respect and love.” Risberg (1997:259) states that a disregard to multiculturalism in the context of cross-cultural M&A’s fuels uncertainty and ambiguity. The disregard to multiculturalism is displayed if communication is “used to homogenise the differing cultures” (Risberg, 1997:259). Seo (2007:10) agrees that acculturation conflicts escalate when organisation members’ desire to maintain their separate culture is strong in a context where the forces of organisational integration are equally strong. Communication “over cultural boundaries” is seen as a strategy to facilitate the understanding of



each others' culture, implying that communication should assist the acknowledgement of diverse cultures, thus creating co-operation among many cultures (Risberg, 1997:259). Communication is crucial to make employees less resistant to change (Young & Post, 1993:36) and to foster cultural tolerance (Seo, 2007:11).

The context of my previous research did not represent a cross-cultural M&A and the two participating management teams consequently did not report on cultural clashes integral to differences in national culture and language. Both hotels that formed part of the multiple case study strategy followed at the time were situated in South Africa. One hotel was located in Kwazulu Natal, the other one in the North West Province, representing South African based acquisitions. Cultural diversity was, therefore, entrenched in different corporate cultures merging, rather than differences in national culture and language. This was not the case in this research, where problem-saturated M&A stories could be ascribed not only to different corporate cultures merging, but also to differences in national culture and language in the setting (Risberg, 1997:257).

**Real time operational issues** portrayed unique contextual demands in the external environment linked to the history of the takeover and resulting operational demands. The takeover was delayed on numerous occasions and ultimately took place at the dawn of the festive season, namely on the "1<sup>st</sup> of December". A manager stated: "*The time they (the acquirer) planned for the taking over, which was the first of July was very, very appropriate...*". When it finally happened on the 1<sup>st</sup> of December 2002, internal and external time pressures adversely influenced a smooth take over related to operational challenges integral to the festive season in the hospitality environment: "*...they (the acquirer) could not manage the situation as well as they would have loved. They have got the Christmas and the New Year bash around the corner, you have got new staff ... on your hands and you have got to change them and prepare them for the future ... if they were given enough time they would have done it much better than they have*".

An added operational challenge was a perceived **lack of ownership** portrayed by both the acquirer and outgoing company that ultimately filtered through to operations and customer service practices. A manager's frustration with the ambiguity in terms of who was responsible for problem-resolution is evident in: "*If you give them to A (outgoing company), A says 'I am vacating this ... I cannot do anything...', so it was just you know, bouncing back and forth*". Another manager emphasised: "*to make decisions were difficult during the takeover*".

Another context-specific cross-cultural M&A theme evolved as the **unique history** of the setting, portrayed by the following comment: *"...all these things, in fact, started many years ago when the place was known as a white elephant and in five years after its operation it was indicated it will be closed."* Someone commented: *"there were lots of hectic situations in the past..."*.

Perceptions about the past of the hotel, the outgoing company and the perceived mismanaged aspects of the M&A process – commencing in the pre-M&A stage and extending into the post-M&A stage – represented **historical biases**. **Historical biases** reflect perceptions and attitudes about the M&A that are carried from the past into the future, resulting in either optimism about the perceived change or resistance to change. Managers mentioned that *"findings took a long time"* in the outgoing company and that they experienced a lack of *"direction in their lives"*; some employees were therefore *"relieved when the (acquirer) came in..."*, thus expecting more certainty. They also had perceptions about how the outgoing company *"stalled the takeover"* and demonstrated *"autocratic"* management practices, whereas management of the acquirer was experienced as being more *"transparent"*. Inquiry into the history of the hotel was thus an important aspect to illuminate the context (Patton, 2002:284).

*"Pleasure of working"* decreased as **emotional distress** and **unique contextual demands related to the external environment** escalated. **Impaired customer service practices** consequently followed: *"We have got customers in front of us ... that need a service from you and what do you say to these customers. They don't know about this politics, which are taking place amongst the two companies. They want service ... it was very difficult."* Customer service was additionally influenced by *"problems with the suppliers"*. It was mentioned that: *"company B took over, they still up to today cannot get certain orders from some of the suppliers"*.

On a personal level **financial constraints** added to managers' stress and despair: *"...if you say you are working for company A (outgoing company), they (the bankers) just tell you, 'we don't guarantee the current situation so we cannot give you something extended for that time' ..."*. Another added: *"Sometimes you would go to the bank and find that it is month end, there is nothing. How much does this destroy you?"*

Questions reflecting **personal and organisational insecurity** were: *"What is going to happen?"*, *"Are we gonna last?"* **Job instability** was a personal experience indicating disharmony in the internal and external environment of managers, adding to the *"trauma that people were faced"*

with". Someone said: "to look for a job is going through someone's mind". "You couldn't plan for the future...", yet you "had to be sure about your future." The **interrelated** and **similar nature** of the abovementioned problem-saturated stories, when compared to the findings of the previous research (Visagie, 2002:57–99) could be summarised by the following comment of a participant: "The dark stories, the mistrust ... the communication ... the rumours ... it is all similar...".

#### 4.3.3 Marginalised Stories Of "Hope And Promise" Reflecting A Sense Of Belonging

**Marginalised stories of "hope and promise"** indicated movement away from the problem-saturated stories to preferred realities, where managers "can even start to have love for the new change." It seemed as if "...the change to a new company offered lots of hope and promise" to some. These stories were, however, marginalised in comparison with the problem-saturated stories, meaning that they received far less attention in the context of this cross-cultural M&A.

"**Hope and promise**", nonetheless, unfolded as phenomena revealing the emergence of new meaning in the midst of the turmoil created by the change process. An **external environment** that supported managers' need to belong seemed to be of cardinal importance in this meaning-making process. It also became evident that a sense of belonging was closely related to leadership practices that fostered personal and organisational security, instead of feelings of ambiguity, mirrored by: "at least we are now dealing with one company..." and "most staff was positive due to assurances given by the new company and the increases agreed to".

**Leadership practices that facilitated personal and organisational security** during the change process evolved primarily as **caring behaviour shown by the acquirer's top management about employees' internal and external needs**. The perceived caring behaviour was apparent in managers' descriptions of perceived need fulfilment in terms of their own and other employees' internal and external environments. Data reflected that managers were not only concerned about their own well-being. The perceived well-being of other employees added to their sense of personal and organisational security. **Internal needs** were, therefore, associated with managers' and employees' bodies, minds and spirits, while **external needs** referred to their need for a physical, social and spiritual affirming external environment (University of Johannesburg, 2009:4). On a **cognitive level** managers described a need to grow professionally. It sounded as if the historical context created space for these stories of "hope and promise". A manager shared that "the previous company was very autocratic and some of the management was degraded and often humiliated ... so this was seen as a positive change". Another one commented that

*“change (was) a relief after working with the same company. There wasn’t much growth in the old company ... the new company offered lots of hope and promise”. The perception that the acquirer would provide opportunities for professional growth is verified by a managers’ reflection that “we see growth especially because of the training that has started which is to better us...”. The perception of professional growth was maintained by “promises that the new company was determined to train and empower the staff...”.*

On an **internal spiritual dimension** managers indicated the desire to be recognised and respected as human beings in interactions, particularly with leaders. The importance of respect and human dignity evolved as fundamental values in this setting, evidenced by the following quotations: *“...(Respect) is important, because as much as he is my boss but I still need that respect...”; “though being hard ... respect human dignity” and “they (management of acquirer) respect that you are a human being. You respond to stimulus ... where they feel they have stepped on your toes, they will wait for you to cool and come back to you and say, ‘you know, I am sure you understand the situational...’, coming back to say I realise I was a bit harsh in dealing with that situational...”.* Respect is an important component of the Swazi culture where grandparents teach the young to respect their parents (Swaziland Tourism Authority, 2007:1).

**Leadership practices** that demonstrated care about managers’ internal needs consequently enhanced managers’ sense of internal security and strengthened their sense of belonging. A manager reiterated the need for a sense of belonging and personal security, by stating: *“you feel needed”* and employees didn’t feel as if *“they are being nailed”* for mistakes.

**External needs** reflected physical, social and spiritual needs that were portrayed by managers as essential to create an affirming external environment (University of Johannesburg, 2009:4).

**Physical needs** were addressed by the acquirer’s effort to improve the physical working conditions for employees, suggested by statements such as: *“the staff canteen has improved...”* and *“promises are fulfilled. Take for example the staff village, there was a lot of maintenance and repair work that was pending...”* and *“with the new management they have got the mandate to change things and they are dealing with their own finances...”*. These quotations mirror an increased sense of safety in terms of the fulfilment of basic, physical needs. It linked closely to the internal environment of managers. Mental health is described by the Theory of Health Promotion in Nursing (University of Johannesburg, 2009:4) as the result of the interaction between the internal and external environment. By addressing the physical needs of employees,

managers felt that the acquirer's top management displayed respect for human life, thus creating the potential for increased harmony between managers' internal and external environments.

The **social dimension** denoted the interpersonal work relationships characterised by a sense of being included in decision-making processes. Such inclusion allowed managers to experience an increased sense of belonging: *"We were not part of the company A family image ... that sense of belonging is a little bit stronger now with company B"* and *"at first there were two families ... there was this better family than the other one ... the General Manager, the assistants were the better ones than us because we were being left out, but now it is not the case"*. The family emerged as a highly regarded institution. Managers reflected this by repeatedly referring to the work-related context as a family context: *"you feel part of the family even if there is something wrong..."*. They also shared a need to belong in terms of the use of English as a business language in this context: *"the other family would change into their language ... and you just stand like a fool"*. Literature confirms the importance of family life in the Kingdom of Swaziland (Swaziland Tourism Authority, 2007:1). The way of greeting guests by saying *"welcome home"* was a further reflection of the importance of the family theme.

Data indicated that the **General Manager**, as the immediate head of the work-related family, **fostered a sense of belonging** by including staff in communication processes. This resulted in a more unified workforce who felt *"part of a team"* and who experienced that they were *"actually pulling in one direction here"*. Managers made the following comments to support this notion: *"The General Manager includes us all if there is a problem or includes us if there is something good..."* and *"the staff was more committed afterwards because they were consulted and had input in the process and understood what was expected"*. A participant also mentioned that *"it is for the first time to see ... a boss ... a General Manager ... having that open conversation with you..."* He was further perceived as a *"hands-on manager"*. This is in line with cultural practices as evidenced by literature conveying that *"the father is the head of the homestead, his authority is respected and obeyed"*, while the *"child is taught to share both the fruits and problems of life with the other members"* (Swaziland Tourism Authority, 2007:1).

On an **external spiritual level** the change held the promise of meeting social responsibilities: *"a very necessary drive to market for locals has been initiated ... we are now making an impact on the local scene"*. It also impacted on a positive future vision: *"Staff was happy that they would get the layoff packages and still retain employment with current benefits"*.

It can be concluded that the stories of “*hope and promise*” were a portrayal of managers’ ability to generate meaning in the midst of the turmoil created by a cross-cultural M&A. This finding correlates with my preceding research in which I concluded that the ability to create meaning in the midst of turmoil implies a spiritual process. It is a matter of faith and hope (Visagie, 2002:86).

#### 4.3.4 Recommendations For Improved M&A Implementation Practices

An important theme emerged as managers proposed **recommendations for improved M&A implementation practices** in a context of a cross-cultural M&A. These recommendations aimed to ease the transition process and imminent tension integral to the paradoxical constructions of reality related to the cross-cultural M&A. In essence it meant that problem-saturated stories and marginalised stories of “*hope and promise*” should be balanced. The act of balance was portrayed in data as conscious implementation practices that focused on unleashing the generative potential inherent in the paradoxical nature of the cross-cultural M&A through the co-construction of an affirmative mental health enhancing environment. These recommendations suggested that personal and organisational security would escalate in an organisational environment that demonstrates practices of care and concern during M&A implementation.

The recommendations theme described below consists of two sub themes that are composed of different aspects, namely:

- Generating an affirmative mental health enhancing environment
  - Appreciative communication practices driven from a value perspective
- Enabling practices to fulfil a need for knowledge and skills transfer
  - Training programmes and “*team building*”

##### 4.3.4.1 Generating an affirmative mental health enhancing environment

The theme that suggested the importance of **generating an affirmative mental health enhancing environment** focused predominantly on **communication practices** between top management and managers. It emphasised the need for such practices to demonstrate appreciation for, and give recognition to, the opinions and beliefs of others: to respect their dignity, and treat them with honesty. Top management was requested to “*look after their (employees’) working environment, mental and physical well-being*” and to “*care*” about employee “*problems*”. It seemed as if managers yearned for a working environment that reflected unity, thus facilitating a sense of participation and inclusion. A manager shared: “*We wanted a common*

*ground on how to address the situation...". Another one supported this view by stating: "leadership must fall in line with the line staff in terms of information so that they have answers ... and be able to clean the air in the event of dark clouds". Yet another appealed for "encouragement to all involved that when we grow, let us grow together and work toward one common goal".*

**Appreciative communication practices driven from a value perspective** emerged as a key prescription to create unity and to affirm both the problem-saturated nature and the generative nature of the cross-cultural M&A. These communication practices focused mainly on strategies that implied speaking a language of appreciation, accepting the paradoxical nature of the change phenomenon, as well as investing in meaningful working relationships. It was envisioned that appreciative communication practices driven from a value perspective would ultimately diminish alienation in the work context and demonstrate principle-centred leadership.

**Open, accurate and clear communication** was described as a crucial aspect to achieve this end. Managers asked for *"a clear line of communication involving all parties that would be affected by the move"*, as well as making *"sure that information is understood and correctly interpreted"* and providing *"accurate information"*. *"Transparency"* or *"communication of the truth"*, as well as the acquirer's intentions evolved as a factor that would enhance employees' sense of belonging: *"...talk to the people all the time about what the new Industry intends to do and this would make the people realise that they are part of the change and the Industry."* Another manager agreed by relating *"growth and stability"* to the level of *"direction"* provided by the top management, representing the leaders, of the acquirer.

A participant urged that management should *"try to stop rumours"* because *"what really makes people to be afraid is not knowing and entertaining rumours"*. It was also stated that leaders should *"not make promises that they might not be able to keep"*. This links closely to a request for **principle-centred leadership** that reflects the values of respect, human dignity and recognition.

**Conversational practices** underpinned by these values are evidenced by the following: *"It is not direct criticism onto the person, but what is criticised is the job that you have messed up. This is the way we need to do things ... respect that you are a human being ... where you have gone wrong lower yourself not to take the stance that I am a manager, a boss over this person so I can talk anyhow, I can do things the way I feel like. There is the period of coming back to say, 'I*

*realise I was a bit harsh in dealing with that situation ... I very much apologise for the incident that happened' ". The quest for human dignity and respect was further supported by a need to be acknowledged on an individual level: "We felt if people would talk to us one-by-one it would be better"; and to be respected in terms of cultural differences: "respect towards staff ... fellow workers" that include "no racism, do not treat them as if they are stupid, respect their views and offer them the opportunity to do their jobs with dignity and pride by advising and guidance".*

A **key relationship** underpinned by the value of respect, evolved as the relationship between the General Manager and the management team: "...as much as he is my boss, but I still need that respect" and "make sure that the leader is respectful". **Practices of fairness** were suggested: "when he is giving the hiding to everybody, it is the same". It was furthermore mentioned that the relationship should allow for communication to be "a two-way system" where "you are also allowed to give your suggestions".

**Care and concern** should, furthermore, be practiced through actualisation of the value of recognition in order to "motivate" employees: "People need to be thanked for the job they are doing as much as they are paid for the job they are doing" and "be specific in praise and reprimand". A manager reflected on the value of work satisfaction by suggesting that "humour" and "fun" should be practiced at work. Managers showed their sense of loyalty to co-workers in the following comments: "remember that everyone is very important from top to bottom in their respective jobs..." and "assurance that if they perform their duties they will be developed to do their duties better and that they can grow and be promoted in their fields."

The **power of language** to move people towards transformation should not be underestimated. The post modern discourse supports the notion that language is the medium of human experiences. Gadamer (in Cooperrider & Avital, 2004:81) emphasises: "Language allows humans to dwell in the house of being ... Language is the fundamental mode of operation of our being-in-the world and an all-embracing form of the constitution of the world". When communication focuses on deficits, the problem-saturated nature of the situation is enhanced. When it focuses on appreciation and reframing of paradoxes, the generative potential of the cross-cultural M&A is recognised.

The concept of **principle-centred leadership** was coined by Covey (1999) in his book, "Principle-centred leadership". Principle-centred leadership will receive further attention in



Chapter five in relation to a description of the role of the company stakeholders as secondary programme recipients.

#### **4.3.4.2 Enabling practices to fulfil the need for knowledge and skills transfer**

Managers finally proposed specific **enabling practices to fulfil a need for knowledge and skills transfer** in the context of this cross-cultural M&A. These included the implementation of training programmes as evident by the following quotations: *“People need to be trained especially to the standards of the new company”* and *“empower middle management immediately...”*.

*“Team building”* was suggested as a strategy to create a learning environment that would result in knowledge and skills transfer, confirmed by the following statement: *“I can see that this is going to be a first class company, better than the others in this region, because we needed a company, to first build the team by showing the light on ... policy, get people views, then implement your system, lead and follow...”*.

These **recommendations** matched the recommendations that were voiced by the two management teams in the preceding research, namely to *“take advantage of the change”* through practices reflecting managerial competence, speaking a language of influence, sharing common values and creating a sense of belonging (Visagie, 2002:90–100). **Qualitative differences** could be ascribed to the unique nature of the context and invited participants.

Managers’ recommendations for improved M&A implementation practices were considered and integrated as programme guidelines to enhance the worth of an Appreciative M&A team coaching programme that represents the unique contribution of this research (Chapter five).

#### **4.4 CONCLUSION**

The situational analysis that formed a central part of this phase of the research process was aimed at answering two critical questions, namely if the previously generated M&A team coaching programme could be applied to the context, as well as what recommendations should be considered as guidelines to enhance programme worth in the context of a cross-cultural M&A.

I have learnt numerous lessons through my engagement with the data that guided the inquiry into these two questions. I discovered that managers’ experiences of the cross-cultural M&A mirrored

the experiences described by the two management teams in my former research regarding their lived experiences of an M&A change process. I am convinced that there are certain universal emotional and behavioural responses to M&A change that influence organisational performance levels. These responses are intrinsically linked to the paradoxical nature of this form of organisational change, meaning that M&A change is simultaneously perceived as favourable and unfavourable, depending mainly on the quality of the communication practices between the acquirer's top management and managers of the target company - the hotel in this context. A pervasive pattern of miscommunication trickled down from top management to all staff categories, ultimately influencing managers' confidence in relationships with the self and others (reporting colleagues and customers). Strategic appreciative communication practices seemed to be the least present during the pre-M&A stage when important attitudes towards the acquisition and the acquirer were shaped.

I have learnt that managers' mental health was threatened by the dominant problem-saturated stories. These stories reflected a cross-cultural M&A as an alienating experience that robbed managers of a sense of belonging. Managers expressed a deep-seated sense of personal and organisational insecurity on the one hand, yet on the other hand praised leadership practices that seemingly facilitated personal and organisational security, thus providing "*hope and promise*". It can therefore be argued that there was a need for an M&A programme that departed from an Appreciative stance in this context, focusing on facilitating managers' mental health for sustained performance in a context of company culture integration.

Context-specific perspectives of the cross-cultural M&A reflected qualitative differences in the findings of the two research projects. These differences were linked to managers' descriptions of the unique contextual demands of the cross-cultural M&A. Contextual demands emerged as cultural diversity that was triggered by dehumanising relational practices such as not respecting managers' language preference, as well as real time operational issues and historical biases. These perspectives called for an M&A team coaching programme that would display cultural and contextual sensitivity.

Managers' recommendations to improve M&A implementation practices correlated with the recommendations of my preceding research (Visagie, 2002:90–99). These recommendations affirmed managers' need for a programme that would unleash the generative potential inherent in the paradoxical nature of the cross-cultural M&A. Firstly, by generating an affirmative mental health enhancing environment through appreciative communication practices driven from a value

perspective and, secondly, through training and team building that will result in knowledge and skills transfer.

The recommendations raised important valuation questions that I was committed to answer at the end of the research process. These questions were:

- Did the programme succeed in facilitating managers' mental health for sustained performance in a context of company culture integration?
- Did the programme facilitate an appreciative mental health enhancing environment that fostered increased personal and organisational security through the demonstration of appreciative communication practices?
- Did the programme result in knowledge and skills transfer, thus optimising managers' relationship with the self, others and the environment?

Considering the findings of the situational analysis, I have learnt that I could transfer the programme to the context and the key stakeholder group, namely a management team engaged in a cross-cultural M&A.

The next chapter is an extension and further description of the findings of the second phase of the research. It focuses primarily on a description of a refined conceptual framework of an Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance as well as on a description of how the conceptual framework was lived.

# Chapter 5

## LIVING THE REFINED CONCEPTUAL FRAMEWORK OF AN APPRECIATIVE M&A TEAM COACHING PROGRAMME TO FACILITATE MANAGERS' MENTAL HEALTH FOR SUSTAINED PERFORMANCE

*"...we are moving to the world of learning (knowing) that we have the power to change and do things."*

(Lukwethi team, 2005)

### 5.1 INTRODUCTION

**Chapter three** provided a summary of the findings of my previous research and the guidelines I generated to facilitate an M&A team coaching programme which aimed at facilitating managers' mental health in a South African hospitality environment (Visagie, 2002). Programme generation – including the development of guidelines – was guided by Dickoff, James and Wiedenbach's (1868:423) thinking map representing a conceptual framework (Table 3.1). This could be seen as part of the old research story. In **Chapter four** I reflected on the findings of the situational analysis that I conducted as part of the first phase of the recent research process - in which I aimed to establish whether the previously generated programme could be applied to the context of this research. These findings affirmed the potential for programme applicability in the particular setting, by building a bridge between the previously recorded and current research stories that are reflected in **Chapter five**, forming the basis of the **second phase** of the research process.

The **aim** of Chapter five is, therefore, to describe how I realised a cycle of programme refinement, implementation and valuation activities in order to establish the worth of the emerging Appreciative M&A team coaching programme mainly based on managers' experiences. Managers' pursuit for a programme that was rooted in appreciative practices, resulted in the renaming of this programme to an 'appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance' (4.3.4).

Table 5.1 and Figure 5.1, reflecting the central concepts of the refined conceptual framework of the programme, form the basis of the initial discussion. My ultimate target is valuating the effectiveness of the programme on facilitating managers' mental health for sustained performance in a context of company culture integration. This assessment will, furthermore, include determining whether it succeeded in the facilitation of an **affirmative mental health enhancing environment** that fostered **increased personal and organisational security** through the demonstration of **appreciative communication practices** and, finally, whether it resulted in **knowledge and skills transfer**, thus optimising managers' relationship with the self, others and the environment (4.4).

## 5.2 LIVING THE REFINED CONCEPTUAL FRAMEWORK

The **findings of the situational analysis** (Chapter four), as mentioned in the introduction, dictated **preliminary refinements** to the conceptual framework of the former M&A team coaching programme, described in Chapter three. The first step in programme refinement was to redefine the concepts and statements of the conceptual framework based on the inductive inferences drawn from these findings (Chinn & Kramer, 2008:190–192). **Ongoing refinement**, integral to programme valuation, refers to continued structural and conceptual changes to the conceptual framework throughout programme implementation. **Programme implementation** followed the guidelines reflected in the description of the refined conceptual framework below. These guidelines – serving as a frame of reference – addressed business team coaches as programme agents in the context of this research. **Valuation** encompassed two levels, namely formative and summative. **Formative valuation** referred to the engagement of managers in ongoing valuation activities to refine the programme while simultaneously implementing it. **Summative valuation** was conducted with managers as part of the concluding phase or programme implementation to establish programme worth according to them. Refer to Chapter two (2.4.2) for a comprehensive description of the research methods employed during this phase of the research.

The conceptual framework reflects an adapted version of Dickoff, *et al.*'s (1968:421–423) thinking map, focusing on the agent, recipient, context, motivation for programme implementation, procedure and destiny (outcome). It presents a systematic view of the research phenomenon by describing the relationship between concepts (Creswell, 1994:82).

The same thinking map, used to generate the initial conceptual framework (Figure 3.1) described in Chapter three, is used to describe the emerging theoretical foundation of the Appreciative M&A team coaching programme. The focus at this point in time is how the framework was lived or implemented in the research context over a period of three years. The literature control aims to re-contextualise the interrelated concepts within existing literature (Morse & Field, 1996:37). Theory generation is represented by the activities of describing the conceptual framework and substantiating it with literature.

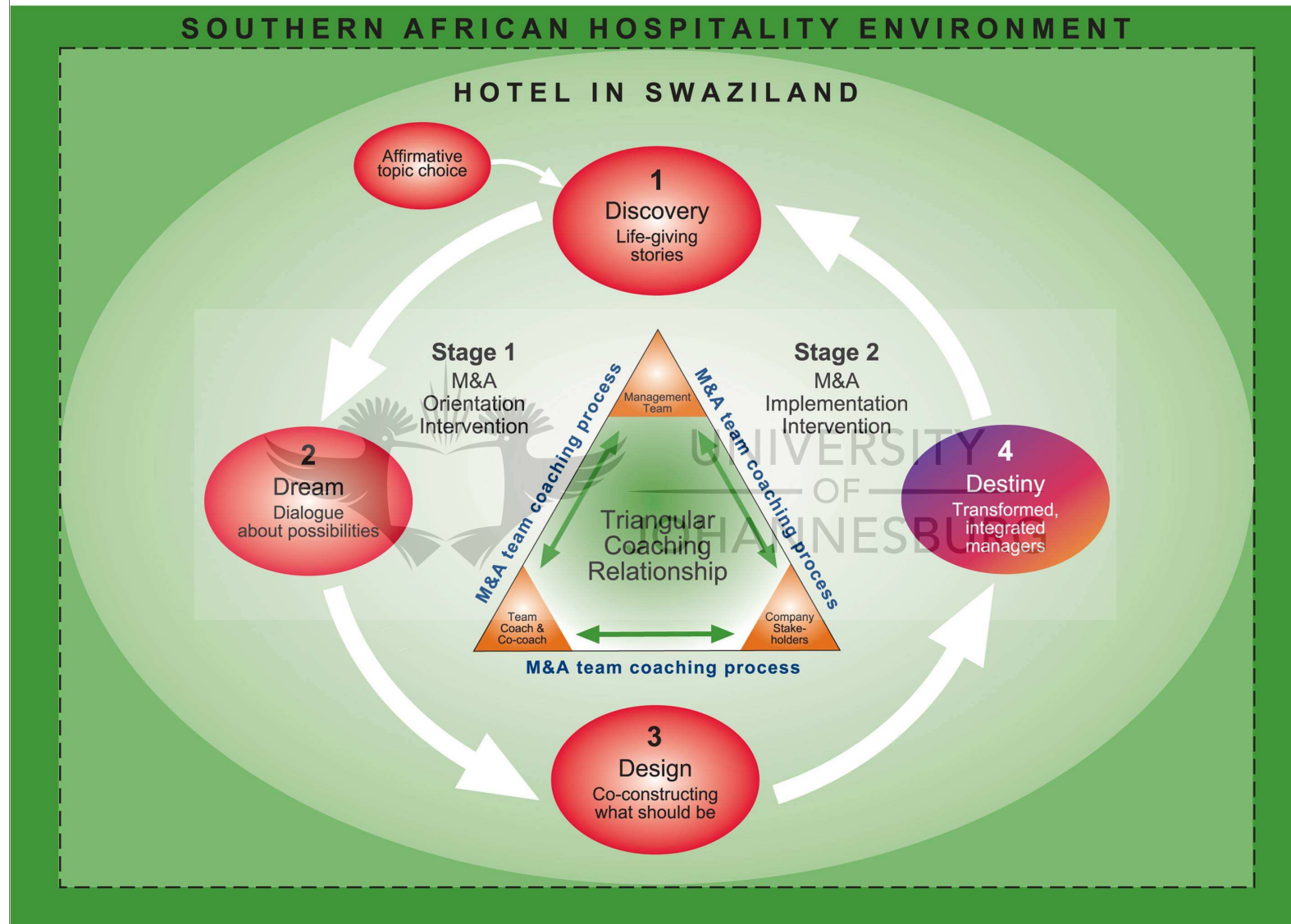
Firstly, the central concepts of the refined Appreciative M&A team coaching programme, situated within Dickoff, et al.'s (1968:421–423) thinking map, are presented in Table 5.1. A graphic description of these concepts is then presented in Figure 5.1. Different colours illustrate the interrelated concepts. I hope that the interplay of colour reflects the intention with which I departed on this journey, namely to implement an Appreciative M&A team coaching programme that would generate a mental health enhancing atmosphere imperative for sustained performance. In the account that follows I made use of my self – my thoughts, feelings, understandings and experiences – to collaborate with relevant stakeholders to gain better understanding of, and insight into, their lived experiences. Once an individual's lived experiences are understood, his or her life can be particularly enriched (Foster, McAllister & O'Brien, 2006:46).

The conceptual framework illustrated in Figure 5.1 was the result of adapting the 4-D Appreciative Inquiry cycle originally developed by David Cooperrider (Cooperrider, Whitney & Stavros, 2003:30) to the context under study, ultimately merging it with an M&A team coaching process that is at the heart of the triangular coaching relationship.

**Table 5.1 Thinking map according to Dickoff, et al. (1968:423)**

<p><b>Primary agent</b> <b>Secondary agent</b></p>	<ul style="list-style-type: none"> <li>• Team coach</li> <li>• Co-coach</li> </ul> <p>Both were advanced psychiatric nurse practitioners who obtained advanced professional business and life skills coaching and mentoring qualifications during the course of programme implementation.</p>
<p><b>Primary recipient</b> <b>Secondary recipient</b></p>	<ul style="list-style-type: none"> <li>• Managers belonging to a specific management team engaged in a cross-cultural M&amp;A.</li> <li>• The acquiring company, with reference to specific company stakeholders in this context, namely the Chief Executive Officer and the Director of Organisational Development.</li> </ul>
<p><b>Context</b></p>	<ul style="list-style-type: none"> <li>• A Southern African hospitality environment with reference to a hotel in Swaziland that was acquired by a Southern African property and hotel owning group in December 2002, representing a cross-cultural M&amp;A.</li> </ul>
<p><b>Motivation</b></p>	<ul style="list-style-type: none"> <li>• The company stakeholders requested programme implementation based on their realisation of the underlying challenges inherent to M&amp;A change processes.</li> <li>• The findings of the situational analysis indicated a need for an M&amp;A programme that would unleash the generative potential inherent to the paradoxical nature of the M&amp;A experiences in order to achieve programme destiny. In essence it entailed the generation of an affirmative mental health enhancing environment.</li> <li>• A third motivation was to contribute a worthy programme to the knowledge and practice base of business coaching.</li> </ul>
<p><b>Procedure</b></p>	<ul style="list-style-type: none"> <li>• An Appreciative M&amp;A team coaching programme that was realised in two distinct, but interrelated, stages, namely the M&amp;A orientation intervention and the M&amp;A implementation intervention. Appreciative Inquiry, integrated with a M&amp;A team coaching process, represents the theoretical framework of the programme.</li> </ul>
<p><b>Destiny</b></p>	<ul style="list-style-type: none"> <li>• Transformed and integrated managers that are able to sustain performance related to mental health facilitation.</li> </ul>

Figure 5.1 Refined conceptual framework of an Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance





### 5.2.1 Role Of The Primary And Secondary Agents In Programme Implementation

I fulfilled the role of the **primary agent** in programme implementation (Figure 5.1). It meant that I was essentially responsible for the facilitation of programme implementation, including valuation and ongoing refinement activities, as part of my dual role as an external business team coach and researcher. The **secondary agents** were two co-coaches, one external (Annie) and the other internal (Jeanette), who were engaged in the M&A team coaching process for a period of eighteen months respectively (Figure 5.1). They fulfilled supportive roles in the actualisation of programme implementation, valuation and refinement. As co-coaches and field workers respectively they acted as reflective mirrors, conversational partners and perspective-enhancers in the process.

The concept “**team coach**” is an inclusive term that refers to both the primary and secondary agents in the section that follows. The use of the concept “we” or “us” refers to the dual coaching partnership between a co-coach and myself at the specific point in time. We commenced the journey as advanced psychiatric nurse practitioners, departing from a position where we had had limited exposure to the business world, and no formal coaching qualifications. On entry our “construction kit” (Stamps & Lipnack *in* Cooperrider & Avital, 2004:43) consisted of who we were and what we believed in. Our coaching experiences were embedded in previous unofficial personal as well as professional coaching interventions in a number of contexts. Our “construction kit” also contained advanced psychiatric nursing skills and competencies such as practicing from a facilitative stance, consciously employing facilitative communication skills, the ability to deal with ambiguity and to recognise group processes and dynamics.

Annie partnered with me and the team throughout the situational analysis until December 2004. Her departure was linked to re-claiming her independence in the field of team coaching. Jeanette, an internal co-coach, carried on with the journey and ultimately became an important source of company-specific knowledge. I remained in an external coaching position for the duration of the M&A coaching programme.

Jeanette and I obtained professional qualifications as advanced professional business and life coaches in August 2005. This was of great assistance in adding more coaching-relevant words to our practice. Speaking the coaching language proved to be of cardinal importance for meaningful translation during the coaching process. It further provided us with real-time coaching tools to ensure outcome-based practices.

Yalom (1995:414), an experienced group therapist, argues that working with a co-therapist poses both advantages and potential challenges in group facilitation. This is also relevant in a coaching context. The coach and co-coach may complement and support each other. As a sub-team their cognitive and observational range is greater, resulting in the generation of more strategies. They may consciously split roles, one assuming a confrontational role, while the other is more nurturing. In this context, Annie joined the coaching process as the first co-coach. As an African woman, her fit was congruent with the teams' ethnic orientation, thus allowing for increased cultural sensitivity during the initial period of programme implementation (May 2003 – November 2004).

It was my experience that the presence of a co-coach lessened my own anxiety and created an opportunity for personal and professional growth. In the post-coaching conversations we shared valuable feedback, resulting in personal reflections and behavioural changes. This did not mean that working with a co-coach was without unique challenges. Yalom (1995:416) describes relational challenges in the co-facilitation format. It was also relevant to the co-coaching format pertaining to this context. Trust and collaboration emerged as crucial elements in the co-coaching relationships. We joined forces in learning how to exploit each other's strengths, how to speak a congruent language and to deal with personal competitive issues. Yalom (1995:416) warns about facilitators pursuing their own agendas and state that it often results in a group being "distracted and unsettled".

An account of **role fulfilment** in this context follows below. It refers to the **team coach** as a **relationship builder** and a **performance influencer** in the pursuit of generating the desired programme destiny (Table 5.1). The findings of the situational analysis emphasised managers' quest for an **affirmative mental health enhancing environment** vital to company culture integration (Figure 4.1 & 4.3.4). It meant that we had to apply specific coaching roles consciously to unleash the generative potential inherent to the paradoxical nature of the M&A process, hence creating a learning culture that would facilitate managers' mental health. It should, however, be noted that role fulfilment was an evolving process. I do not claim that we lived these roles perfectly. Instead, I aim to share the value of realising these roles in coaching relationships based on the findings of the situational analysis, personal experiences and supporting literature. A valuation of how we realised these roles during programme implementation is further central to the findings of programme valuation described by the managers as part of programme realisation, as well as by the expert stakeholder group in Chapter six.

With reference to the conceptual framework presented in Figure 5.1, the team coach and co-coach are presented as a shaded orange coloured triangle. It indicates the concept of

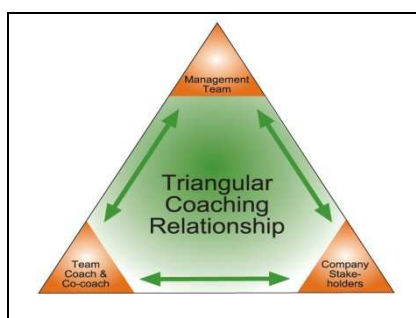
**personal wholeness**, incorporating body, mind and spirit. As coaches we strove to **interact wholistically** in an integrated fashion with the **internal and external environment** (University of Johannesburg, 2009:4). The colour orange represents the concept of wholeness in the conceptual framework and reflects intellect, emotional endurance and spiritual connectedness. The shaded colour depicts the interwoven paradoxical nature of human life that was also relevant in this context. The colour combinations reveal the interplay between untapped possibilities, hope and passions on the one hand, with ever present human suffering and areas of growth on the other hand.

The **internal environment** refers to the internal structures of the team coach, namely the **body, mind and spirit**. With **body**, I mean our physical structures and biological processes. **Mind** refers to our intellectual, emotional and volition processes. The **intellect** involves the capacity and the quality of our psychological processes of thinking, association, analysis, judgement and understanding at the time. The **emotions** reflect a complex state and include affection, desires and feelings that played a crucial role in role fulfilment. **Volition** refers to the process of decision-making in the execution of choices related to the coaching context. **Spirit** refers to the part that mirrored our relationship with God. It consists of two interrelated aspects which have an integrated function, namely **relationships** and **conscience** (University of Johannesburg, 2009:4–6). The relational component thus incorporates our core values driving our relationship with the self, others and the environment.

As wholistic beings, we were in constant interaction with the **external environment** that embodies the **physical, social and spiritual dimensions** (University of Johannesburg, 2009:5). **Physical** refers to the structures in our external environment (University of Johannesburg, 2009:6), with specific reference to the hotel in Swaziland and other relevant company structures.

The **social dimension** involves the human resources in the external environment (University of Johannesburg, 2009:5–7). It refers predominantly to the **dynamic triangular coaching relationship** between the stakeholders (Figure 5.2).

**Figure 5.2 Triangular coaching relationship**



The **stakeholders** that form part of the triangular coaching relationship included the management team as the primary programme recipient, the company stakeholders (Chief Executive Officer and the Director of Organisational Development) as the secondary programme recipient and the team coaches as programme agents. Although the primary relationship was between the team coaches and the management team, the organisation had an important stake in the relationship (Dembowski, *et al.* 2006:12). The **triangular coaching relationship** (Figure 5.2) illuminates the social exchange between the stakeholders. It signifies a **triangular coaching contract** between these parties and is portrayed as a green and white triangle.

The **triangular coaching contract** entails the desired outcomes that stakeholders had in mind when they entered the coaching relationship. These desired outcomes represented the stakeholders' coaching agendas or mandates. We strove to actualise the contract in a meaningful way by marrying the stakeholders' coaching agendas with each other, resulting in performance outcomes that were met.

Green was chosen to symbolise growth and hope in the possibility of achieving a meaningful marriage between stakeholder agendas. The green two-way arrows indicate the mutual integrative nature of relationships between the stakeholders. The white outer part of the triangle illustrates moments of goodness, light and fun that transpired in connection to the marriage. It further depicts the component parts that emerged as a blueprint for the creation of successful coaching relationships, namely trust, respect, openness, honesty, integrity and resilience (Alexander & Renshaw, 2005:150–161). It closely relates to the **external spiritual dimension** that pertains to the values and religious aspects of the stakeholders (University of Johannesburg, 2009:5–7). It was my experience that the connection between personal and external organisational values in this context resulted in cooperation between stakeholders in the case of value agreements, and resistant behaviour in the presence of value differences. This experience was further verified by managers' request for appreciative, value-driven communication practices during the situational analysis (4.3.4).

As this programme was aimed at facilitating the mental health of managers engaged in a cross-cultural M&A, it was imperative that we **role modelled internalised mental health behaviour** in our roles as team coaches. A description of how we consciously acted as **relationship builders** and **performance influencers** follows below. Living these roles were linked to the realisation of various interrelated activities. These activities resist clear categorising based on their interrelated nature. The role categories which follow are thus not mutually exclusive, but merely aim to provide the reader with a theoretical framework.

### 5.2.1.1 Team coach as a relationship builder

Three levels of **relationship building activities** transpired in the pursuit of mental health facilitation in a context of company culture integration, namely establishing a meaningful **relationship with the self, others and the environment**. The **relationship with the self** starts with looking into the mirror ourselves and reflecting on what really matters to us. Hargrove (1995:19) points out that coaching does not begin with setting goals, motivating people and dissecting their performances so as to get more out of them. Instead, it implies “seeing who we are in the context of taking a stand for the future of people, institutions and the world”, thus constructing “business enterprises that are not only outstandingly productive but that nurture the human spirit and allow people to learn and to grow”. His advice is to refrain from commencing a coaching relationship by asking “What do I do?” but instead “How do I ‘be’?” He links this to the Eastern traditions of actualising one’s inner nature as a requirement for meaningful learning. I agree with Hargrove (1995:41, 39) that students learn as much from a teacher’s quality of being as from his or her knowledge and technical skills.

The value of commencing the triangular coaching relationship with a focus on the self was essential in this context. I was aware that my beliefs, values and assumptions as a coach had the potential to either reinforce or inhibit particular capabilities and actions, based on the deeper motivations which drove me to act or to persevere (Dilts, 2003:xxii). Constantly striving to become more than what I was ultimately assisted me to live with purpose in this context. Salvio (*in* Bolton, 2001:3) is of the opinion that we must “travel into our own worlds” in order to “travel to those of others”, gaining empathetic understanding. Murell (*in* Cooperrider, *et al.* 2001:107) agrees with this assumption. He states that healthy and spiritually grounded consultants (coaches) should facilitate organisational development processes, because it takes remarkable faith and endurance. He further proposes that a healthy and balanced perspective of work is required along with a well-developed sense of humour and the ability to appreciate humility in both the self and others.

With reference to mental health and the **relationship with the self**, Perko and Kreigh (1988:28) list the following competencies that the team coach and co-coach should exhibit: (1) self-knowledge and self-identity by accepting the self in terms of strengths and areas of growth, (2) the competence to accept criticism and feedback, (3) the ability to meet or postpone gratification of basic needs, (4) goal-orientation and actualisation, (5) the ability to establish a value system, (6) the competence to use past experience to illuminate the present and to plan for the future, (7) assuming responsibility for self-learning and growth, (8) productivity and achieving satisfaction and pleasure from work, (9) the ability to integrate thoughts, feelings and actions, and (10) to resolve conflict.

In terms of **relationship with others** the team coach and co-coach should be able to: (1) establish and maintain trusting, satisfying and lasting personal relationships, (2) assume responsibility for terminating those relationships that may be harmful, (3) validate the feelings of others, (4) work collaboratively, thus creating partnerships, (5) be willing to compromise when appropriate, (6) communicate directly, (7) use body gestures congruently to facilitate meaningful communication, (8) vary the content of communication suitable to the situation and (9) demonstrate respect for others (Perko & Kreigh, 1988:28).

With regard to the **team coach and co-coach's relationship with the environment** the following key competencies were of importance: (1) competence to organise the environment, (2) to exert healthy control over or adjust the immediate environment, (3) to adapt to change, (4) to engage in planned, thoughtful and responsible activity and (5) to resolve power struggles through cooperation and collaboration (Perko & Kreigh, 1988:28). Note that failure to possess one or more of the competencies listed in these three areas does not signify mental illness, but rather points to areas of inadequacy and decreased potential for optimal performance (Perko & Kreigh, 1988:27).

The **relationship of the coach with the self, others** and the **environment** closely links to the concepts of **emotional, social and contextual intelligence**. **Emotional intelligence** is defined by Cooper and Sawaf (2000:xiii) as the "ability to sense, understand, and effectively apply the power and acumen of emotions as a source of human energy, information, connection, and influence". It is my experience that emotions are often marginalised in business contexts, as well as in the context relevant to the research. Eastaugh (in Bolton, 2001:16) supports this view by stating that emotions in the world of work is mostly like icing on top of a cake, for decoration or self-indulgence, and not for real substance. Many individuals view these emotions with scepticism, driven from an assumption that too much will make you sick and is unnecessary. Emotions are therefore often pushed aside and ignored in business contexts.

Contradictory to this view of emotions in the work place, Goleman (1998:94), a key figure in the field of emotional intelligence, argues that well orchestrated emotions should instead be seen as a key drive to enhance employee performance. Well orchestrated emotions, which underpin emotional intelligence in a context of team coaching, are closely linked to the coach's competence to demonstrate **self-awareness, self-management, motivation, empathy** and **social skill** (Goleman, 1998:95).

**Self-awareness** refers to the coach's ability to develop a realistic self-perception through authentic understanding of personal emotions, strengths, growth areas, self-limiting believes,

needs and drives. The coach should have a clear understanding of his or her personal values and goals. Self-awareness is an important cornerstone in the facilitation of personal and professional change. In essence it entails being “real and true to yourself” (Cooper & Sawaf, 2000:vii). **Self-reflection** was a key skill needed by the co-coach and myself during programme implementation to enhance our self-awareness. It involved consciously setting time aside to ask questions about our feelings, actions and ideas concerning peak experiences, as well as events that we perceived as challenging. On a **personal level**, self-reflection enabled us as coaches to be mindful of potential knowledge, skills and attitudinal gaps representing our learning needs (Bolton, 2001:xiii–xiv). On an **interpersonal level** it entailed **reflective dialogue**, expressing coaching stories with interested parties, such as the co-coach, coaching peers and the management team. It also entailed a process of **reflective letter** writing between us and the team as described in Chapter two and reflected in appendix 7.2.

**Self-management** refers to the actualisation of self-control by team coaches. Goleman (1998:98) describes it as the ongoing inner conversations that channel our negative emotions into constructive actions, instead of responding involuntarily to biological impulses. He contends that “people who have mastered their emotions are able to roll with the changes”. Positive self-talk emerged as a valuable competency in the pursuit of self-management, especially in relation to challenging interactions in the triangular coaching relationship at times.

**Motivation** is an essential trait that a team coach should have. It pertains to be driven beyond your own and other’s expectations (Goleman, 1998:99). In this setting I endeavoured to display, amongst others, motivation through enthusiasm in the programme and what it aimed to achieve. I set out from a standpoint of regarding enthusiasm and energy as powerful internal sources capable of igniting commitment in the triangular coaching relationship. I do, however, agree with authors that firmly state it is not possible to motivate others (Morris, Willcocks & Knasel, 2000:150). Motivation is an intrinsic force. The coach can merely take responsibility for role-modelling self-motivation, and the co-construction of a learning environment that would support intrinsically driven motivation displayed by stakeholders involved in the triangular coaching relationship (Figure 5.2). It is important to note that I did not view the construction of a learning environment as the sole responsibility of the coach, but rather as an integrated responsibility shared by the coaching stakeholders engaged in the triangular coaching relationship; therefore the use of the construct ‘co-construction’.

**Empathy** is the glue which builds trusting relationships. Cooper and Sawaf (2000:51) assert that empathy is rooted in compassion. They believe that it connects individuals with others

through the collective language of feelings and experience. As a team coach it meant that I aspired to be in tune with stakeholders' feelings, controlling my own judgements at times, thus putting myself in their shoes as part of mobilising their internal resources to take appropriate action.

As a coach in this context, I experienced a high demand to marry the coaching agendas of the different coaching stakeholders in the triangular coaching relationship (Figure 5.2). These agendas opposed one another at times and therefore called for the creative wisdom integral to **social** and **contextual intelligence**. **Social intelligence** is defined by Goleman (2007:11) as "being intelligent not just *about* our relationships but also *in* them", thus resembling constructive **social skills**. Goleman (2007:12) further proposes that individuals should act wisely in human relationships and extend their focus from self-interest to collective interest, thus focusing on the social processes and dynamics in relationships. Social intelligence requested that, as coaches, we had to look beyond narrow self-interest to the best interests of both stakeholder categories in order to marry the coaching agendas, thus achieving sustained performance. Contextual intelligence reflects understanding of the priorities and viable actions in relation to particular M&A events (Price & Kruger, 2006:60) and agenda aspects. In this context it necessitated understanding of the organisational and ethnic culture, as well as the roles, capabilities and attitudes of its people (Harding & Rouse, 2007:125).

Zeus and Skiffington (2002:88) point out that there are "always politics" in companies that coaches have to contend with. He suggests that a successful coach "is politically non-aligned, although aware of the political manoeuvring that is inevitable in any organisation". As team coaches we had to learn how to display political savvy behaviour in political situations, to accept corporate politics as a reality and alter our behaviour accordingly, to deal with paradox and ambiguity and, above all, to strive to maintain confidentiality and trust.

#### **5.2.1.2 Team coach as a performance influencer**

In our relationship with the management team we strove to be **performance influencers** through the realisation of competence in the areas of **coaching** and **mentoring**. Martin and Lumsden (1987:19) suggest that sport coaches should continuously encourage "athletes to compete against their previous performance". In a performance conscious cross-cultural M&A environment the same principle applied. **Coaching** was focused at a behavioural level, aiming to assist managers to transform themselves, their communities and their worlds by means of a deep learning process that resulted in embodying new skills and competencies (Hargrove, 1995:15). In this setting **performance influencing activities** involved the process of assisting managers to achieve or improve their behavioural performance (Dilts, 2003:xxii).



It had to do with altering managers' frames of reference, consequently producing profound shifts in their perceptions, ways of being, thinking processes and behaviour as a basis for sustained performance (Hargrove, 1995:174). The Appreciative M&A team coaching process that is described in 5.2.5.1.b was the vehicle used to achieve performance influencing activities.

**Performance influencing activities** were guided by the team coach's competencies labelled by Maritz (2006:54–55) as “attitudes to be formed”, “knowledge to be discovered” and “skills to be mastered”. In line with the **generative activities** inherent to the Appreciative M&A team coaching process in this setting, we were compelled to grow in our ability to model a specific set of attitudes that are referred to as “**attitudes to be lived**”. As suggested by Maritz (2006:54–55) we further aimed to engage in “**knowledge to be discovered**” and to build a repertoire of “**skills to be mastered**”. To influence managers' behaviour we mainly had to display team coaching competencies that would generate a quest for new ideas, images, theories and models that liberate collective aspirations, alter the social construction of reality and open up new avenues of thinking and decision-making (Bushe, 2007:30).

**Attitudes to be lived** refer to the expression of our personal values as team coaches in the context, implying **ethical coaching practices**. The parameters that serve as standards for professional conduct in the coaching field has not yet reached a stage of clear agreement or regulation, meaning that there is no clearly defined professional standards (Skiffington & Zeus, 2006:231). In the absence of clear coaching regulations, our driving ethos was to add value to stakeholders within the triangular coaching relationship through an appreciative M&A team coaching approach which celebrates and evokes human potential. We were therefore guided by our own internal compasses pertaining to professional coaching practices, additionally supported by the professional guidelines adapted from the American Psychological Association (in Skiffington & Zeus, 2006:231):

- *Competence*. We obtained accredited coaching qualifications to carry out our coaching activities competently.
- *Integrity*. We did our best to maintain honest and fair relationships within the triangular coaching relationship, disclosing our coaching qualifications and expertise to all stakeholders involved.
- *Professional and scientific responsibility*. We consulted with colleagues and other professionals to limit unethical conduct and to serve the interests of both the company stakeholders and the managers. During the course of our engagement with the stakeholders in the field, we joined the Coaches and Mentors of South Africa (COMENSA) association, which is affiliated to the European Coaching and Mentoring Council.

- *Respect for individual and collective rights to privacy, confidentiality and autonomy.* Based on the dual accountability that we had to both parties involved in the triangular coaching relationship (company stakeholders and managers), confidentiality emerged as a critical issue in this context. One way in which we endeavoured to managed confidentiality in this setting, was through clear contracting before commencement of the coaching programme.
- *Acknowledge individual and cultural differences.* This was particularly important in relation to the ethnicity, national origin and cultural practices which were unique to this setting.

Our driving ethos was guided by a **generative attitude**, namely an attitude that had the potential of generating an affirmative future based on the quality of the coaching relationships (Bushe, 2007:5). In this context it implied honouring the values expressed by managers as part of their recommendations for improved M&A implementation practices, namely **respect, human dignity** and **recognition** (4.3.4). Rogers (1969:106) contends that the facilitation of significant learning rests upon attitudinal qualities that are ingrained in the personal relationship between the facilitator and the learner.

Realising the role of a **performance influencer** additionally entailed **mentoring** activities. Dilts (2003:xxiv) points out that a mentor assists to shape a person's beliefs and values in a positive way, resulting in internalisation of skills, knowledge and attitudes, so that the external presence of the mentor is no longer needed. He contends that people are able to carry "inner mentors" that provide lifelong guidance even after the physical termination of a relationship. **Mentoring** aimed to "awaken" the mental health of managers by providing contexts and experiences that brought out their best in their individual understanding of their relationship with the self, others and the environment.

**Expressing trust** in our own capabilities and those of the other stakeholders in the triangular coaching relationship emerged as another important attitude to be lived in this context based on the findings of the situational analysis (Chapter four). Managers gave an account of how organisational and personal insecurity can deplete self-confidence. In this setting it implied that we had to embark on a journey of cultivating trust and generating encouragement of the self and others to embrace the best of what is, not only internally, but also in the external environment. According to Dilts (2003:xxiv/xxv) this "results from the commitment to the promotion of something that is already within a person or group, but which is not being manifested in its full capacity" (Dilts, 2003:xxiv-xxv). Rogers (1969:114) compels, "If I distrust the human being then I *must* cram him with information of my own choosing, lest he go his own mistaken way. But if I trust the capacity of the human individual for developing his own

potentiality, then I can provide him with opportunities and permit him to choose his own way and his own direction in his learning.” Trust is recognised for its emotional influence. Trust violations give rise to intense emotional experiences (Weber & Carter, 2003:2).

Trust also entails that we intended to inspire managers to exhibit the values underlying the operational philosophy of the acquiring company, not playing the game for them. Corporate vision aligned with personal vision encourages greater work performance. In our roles as “**vision builders**” and “**value shapers**” (Hargrove, 1995:16), we engaged in active dialogue about these important aspects: firstly by **anchoring information** about the company’s vision and core values, next by actively aligning it to personal and collective values that shaped behaviour in the context and, lastly, by role modelling these values through behaviour (Dilts, 2003:xxv1).

“**Knowledge to be discovered**” is integral to the coach’s actualisation of principles of lifelong learning, assessing, and strengthening knowledge accumulation on a personal and professional level. Hall and Duval (2003:9) describe knowledge accumulation as continuous and accelerated learning that enables individuals to experience resilience and optimism in a dynamic world. It is crucial to actualise as much of one’s own potential as possible in order to move others to optimum self-actualisation.

Managers described a need for enabling strategies that would facilitate knowledge and skills transfer during the M&A implementation process (4.3.4). It was, therefore, imperative to display a sound knowledge of the **theoretical paradigm** that guided programme implementation and valuation, namely **Appreciative Inquiry** rooted in **Social Constructionism**. Knowledge of the philosophies and methodologies of organisational change, with expert knowledge in the field of M&As as well as in business acumen, diversity management, facilitation practices and business and team coaching processes, were also identified as a vital knowledge base to be discovered and pragmatically applied in the context. On an intellectual level we were required to transfer knowledge and understanding that ultimately formed the basis for managers’ competence to play the M&A game. While coaching excellence began with our way of being in this context, it also entailed thorough knowledge of the craft of team coaching.

“**Skills to be mastered**” refers to two interrelated categories of Appreciative M&A team coaching tools and techniques that formed the basis of the Appreciative M&A team coaching programme, namely **care giving** and **performance influencing tools and techniques**. The term ‘**tool**’ refers to instruments in the coach’s toolkit, such as assessment instruments, valuation tools and creative exercises (Zeus & Skiffington, 2002:84), while ‘techniques’ means

the art and skills needed to use specific tools (Zeus & Skiffington, 2002:84). These tools and techniques are described in 5.2.5.1.c to prevent repetition of information. The point of attention in this section is to describe appreciative communication practices that formed the basis of care-giving and influencing tools and techniques. **Appreciative communication practices** were identified by managers as a key coaching skill for successful facilitation of the particular cross-cultural M&A (4.3.4). The implementation of these practices by us in our role as team coaches in particular evolved as **listening deeply**, the **facilitation of generative conversations**, **asking generative questions**, **speaking a language of appreciation** and **realness**.

**Listening deeply** and the **facilitation of generative conversations** between coaching stakeholders emerged as essential skills to facilitate appreciative communication in the context. Listening deeply implied hearing the words and thoughts as well as feeling the tones and meaning that were below the conscious intent of the stakeholders' conversations in the triangular coaching relationship (Rogers, 1980:8). Listening emerged as a vehicle for change when we were able to suspend our judgements, to focus on hearing victories and listen for patterns of action in order to ask generative questions imperative for building sustained performance, ultimately facilitating action.

**Generative conversations** refer to those coaching conversations that facilitated collective inquiry into personal and organisational life giving forces, thus generating an affirmative future. It also required an acknowledgement of the less ideal aspects or the brutal facts of reality in the context (Collins, 2001:89). Collins (2001:89) points out that one of the "primary ways to de-motivate people is to ignore the brutal facts of reality". These conversations were guided by **generative questions** that aimed to inspire new ways of thinking about the self, others and the environment, thus leading to new options for action. Bushe (2007:4) supports this notion and comments that these questions elicit conversations that "challenge the status quo".

The skill to speak a **language of appreciation** was in line with managers' request for an environment that would exhibit mental health enhancing qualities. As coaches we knew how important it would be to appreciate and validate managers for whom they were, for good work done, for the way they handled their responsibilities and for their way of being. In my coaching relationship with the management team, I have personally experienced this as one of the most powerful growth-promoting skills in communication. Rogers (1980:23) declares: "When I am (appreciated), I blossom and expand, I am an interesting individual. In a hostile or unappreciated group, I am just not much of anything ... I wish I had the strength to be more similar in both kinds of groups, but actually the person I am in a warm and interested group is different from the person I am in a hostile and cold group."

**Realness** or **authenticity** formed the basis of the other appreciative communication practices and entailed “authentic presence” (Cooper & Sawaf, 2000:69). Authenticity was communicated in the context of the triangular coaching relationship (Figure 5.2) through congruency, meaning that we strove to communicate messages that conveyed a true connection between what we experienced as coaches at that moment, and how we expressed it as a whole linked to social and contextual intelligence. It also entailed that we felt obliged to encourage realness in others through the use of the aforementioned appreciative communication practices.

Appreciative conversations that lead to enhanced performance in a context of a cross-cultural M&A would, however, not be possible if the team coach does not exhibit adequate **reasoning and thinking skills**. As a “thinking partner” the coach should be able to analyse, interpret and diagnose specific situations to draw conclusions from the evidence (Hargrove, 2003:38; Morris, *et al.* 2000:87). During a group discussion that I attended as part of a coaching course, Kruger (2006) labelled the team coach also as a “process expert”. Contextually, it meant that we had to be observant to group dynamics and processes, including interactional patterns and roles displayed by coaching stakeholders – in essence displaying adequate reasoning and thinking skills.

In conclusion, key characteristics of the team coach as a **relationship builder** and a **performance influencer** in this context, aligned to **emotional, social and contextual intelligence**, emerged as the **ability to inspire**; to **role model appreciative communication** from a value perspective; to **forward action and enthusiasm** to facilitate enabling strategies in order for managers to learn, grow and perform continuously as they move towards an optimum level of mental health.

## **5.2.2 Role Of The Programme Recipients In Programme Implementation**

The **recipients** of the M&A team coaching programme are divided into primary and secondary recipients. Their roles are identified with specific reference to **programme participation**, because clarity of roles, responsibilities and relationships underpin active stakeholder involvement.

### **5.2.2.1 Managers belonging to a specific management team as the primary recipient**

As with the agent of the programme, the mental health of the **primary recipient**, in this case **individual operational managers** that formed part of a **management team**, was of cardinal

importance linked to the context of the cross-cultural M&A that was perceived as problem-saturated, posing a threat to managers' mental health (4.3.2). The **concept of personal wholeness**, as described in section 5.2.1.1, also applied to these managers. Similar to the programme agent, they are thus presented as a shaded orange coloured triangle in the conceptual framework (Figure 5.1).

The situational analysis conducted prior to programme implementation confirmed that the managers were severely affected by the M&A on multiple levels. They acted as buffers between top management and other employees in the organisation on many occasions, draining their internal resources (4.3.2). A manager mentioned that employees were consulting him "*all the time*", yet he perceived that he had inadequate information to alleviate the fears of others and even his own (4.3.2). This, and many other accounts of miscommunication, served as evidence that the operational managers' part in leading the change was impaired and perceived as damaging their credibility. They did not only have to adjust to expectations from the top, but also to those of their reporting colleagues. Their perceived inability to adequately address the needs of reporting colleagues added to their emotional "*distress*". They also had to deal with yet another takeover by a non-Swazi company, creating numerous cross-cultural challenges. Hubbard (1999:18) observed a similar pattern of M&A consequences leading him to believe that 'people in the middle' are the most severely affected by M&As.

As operational managers they were in charge of different departments. In the context of M&A change their **key responsibility** was to ensure a **smooth integration** on an operational level and finding ways to ensure that the goals of the acquirer were met. These managers were not only fulfilling the traditional management roles of administrators and evaluators, they also had to assist different task-teams to make a fuller and more effective contribution to the acquirer, thus showing **leadership**. According to Morris, *et al.* (2000:62) top management usually decides that organisational change is needed, however, the change is led by managers "further down the organisation". It is therefore crucial that middle or operational management should be enabled to drive the necessary changes.

Managers in this setting had a history of working together for many years. Some had worked together since the inception of the hotel. On entering the field I wondered whether they were truly a team or merely a group of people working together. Teams do not just happen by magic; they have to be built and maintained and at the same time share a common purpose (Morris, *et al.* 2000:92 & 95). Common characteristics of a well functioning team in this context would include agreement on team objectives, open communication, bringing a range of skills to execute what needs to be done, a sense of belonging to the team that provokes

mutual trust and support between team members, and regular stock taking (Morris, et al. 2000:102/103). Morris, et al. (2000:98) claims: “Good teams operate as a sort of extended family.”

A **team diagnosis** based on the situational analysis evolved at the time as a team of seven operational managers engaged in a cross-cultural M&A that emerged as paradoxical in nature, encompassing problem-saturated mental health threatening stories and marginalised stories of hope and promise, related to an impaired sense of belonging, secondary to perceived personal and organisational insecurity as evidenced by:

- emotional distress reflected by feeling fearful, ambiguous, undervalued, frustrated, under-trusted and with impaired confidence or influence related to a pervasive pattern of miscommunication, and
- unique contextual demands in the external environment with reference to cultural diversity triggered by dehumanising relational practices, real time operational issues and historical biases.

During the course of the three years that we spent in the field, **team membership changed** in relation to the dynamic nature of the context. Within the context of the specific M&A team coaching programme the **manager** was seen as an **adult learner**. Knowles' (1980:43, 44) assumptions about adult learners subsequently guided programme implementation, namely (1) that adults take responsibility for their own learning and are able to direct the learning process, (2) their accumulated experiences are an important resource for learning, (3) their readiness to learn is needs-related, meaning that they are more committed to learn when it will assist them to manage real life issues, (4) their orientation to learning is life-centred, implying a need to apply the knowledge and skills that they acquire in order to live more effectively in the future and (5) they are internally motivated based on a need for self-esteem and self-confidence.

Managers, as adult learners, were consequently viewed as **important stakeholders** orchestrating their own destiny in a learning environment encouraging lifelong learning. Their accumulated experiences were honoured as a rich resource for learning (Zeus & Skiffington, 2000:185). The programme was about uncovering and developing the strengths that they brought to the coaching alliance. These strengths were embedded within their past experiences, past successes, challenges, hopes and dreams. The **agenda** that managers presented during contact sessions symbolised their unique individual and collective needs. Their coaching agendas were shaped to a great extent by the dynamic context of change of which they formed an integral part. Another influencing factor was company requirements

embedded in the acquirer's management philosophy. They were required to meet specific performance indicators and to adjust to the new company culture.

It is important to realise that **individual managers' behaviour** impacted on the rest of the team, either facilitating or hindering the coaching process. Yalom (1995:1–16) describes how group behaviour might facilitate growth in groups by, amongst others, instilling hope, creating a sense of universalism, imparting information and creating group cohesiveness. On the other hand, Zeus and Skiffington (2000:187) note that prior beliefs might be a serious obstacle in the learning process, resulting in resistant behaviour. In this context facilitating factors emerged as individual and collective behaviour that reflected team support and the generation of an affirmative mental health enhancing environment expressed by stories of hope and promise (4.3.3). **Cultural diversity** and **historical biases** were identified as potential learning obstacles during the situational analysis, with the potential to block new ideas and new experiences, ultimately influencing personal and organisational change in this context.

Lastly, **managers** were viewed as “**students of organizational life**” who **make free and informed choices** as to whether they want to change (Cooperrider & Whitney, 2005:48). It was merely the role of the team coach to provide them with the necessary resources to assist them to do so (Hargrove, 1995:26).

#### **5.2.2.2 Company stakeholders in a Southern African hospitality environment as the secondary recipient**

The **secondary recipient** refers to the **company stakeholders** of the acquirer, namely a specific Southern African property and hotel owning group in which the programme was implemented. A company does not have a heart and a life of its own. Its heart and life is constructed to a great extent by the *way of being* of its leaders, in this case the **Chief Executive Officer**, who is also the owner of the company, and the **Director of Organisational Development**, who is in charge of the business coaching drive. These two stakeholders represented top management and company leaders in this setting. They were also married to each other, adding unique dynamics to the triangular coaching relationship (Figure 5.2).

The symbol - a shaded orange coloured triangle - chosen to represent the company stakeholders in the conceptual framework, matches the symbol that indicates the other stakeholders, namely the two agents (team coach and co-coach) and the primary recipient (management team) [Figure 5.1 & 5.2]. This is once more based on the concept of wholeness described in section 5.2.1.1. The company stakeholders, as the third category of stakeholders,



were viewed as **whole people**, striving to interact in an integrated manner with the environment. Their **mental health status**, reflected in their relationship with the self, others and the environment, was seen as an important aspect contributing to programme success. As leaders in the company they played a major role in crafting the organisational culture and destiny mirrored in the internal organisational environment, such as the company's vision, mission, core values and competencies, leadership, culture, climate, structure and available resources (Plunkett & Attner, 1997:94).

Collins (2001) conducted research on the role of leadership in mobilising companies from "good to great". He claims that "good-to-great" leaders are a "paradoxical blend of personal humility and professional will". These leaders are able to channel their ego away from themselves and to focus first and foremost on the larger goal of building a great company (Collins, 2001:13/14 & 21). He contends that "greatness is largely a matter of conscious choice" and "level five leaders are fanatically driven, infected with an incurable need to produce sustained results" (Collins, 2001:11 & 39). Hargrove (1995:173) agrees that today's companies have to reach new levels of performance, introduce constant change and bring about the best in people. The traditional use of managerial skills or process redesign efforts seems to be inefficient to accomplish these goals. Real change is brought about by unleashing the human spirit and expanding people's capacity to achieve stretch goals in organisations. Highly effective organisations do not only offer employees a job, but rather a "sense of community, security ... mutual trust and respect", as these values will define the organisation and how it operates (O'Reilley III & Pheffer, 2000:7/8).

While Collins (2001:63) found that leaders begin the transformation from good to great companies initially getting the right people on the bus, I believe that company **transformation begins with the self of the leader**. Welch (2005:61) agrees with this notion and states: "Before you are a leader, success is all about growing yourself." In this context it meant that the emotional, social and contextual intelligence of company stakeholders played a major role in the success of the Appreciative M&A team coaching programme. This was confirmed during the situational analysis. Managers affirmed leadership practices that they perceived as facilitating a sense of personal and organisational security during the early stages of the cross-cultural M&A (4.3.3). They urged leaders to be sensitive towards their internal and external needs, **role modelling principle-centred leadership**.

Their internal needs unfolded as a need to be recognised and respected by leaders as a person, as well as a need to grow on a professional level. On an external level their needs transpired as a need for a dignified physical working environment, an inclusive management approach and the ability of meeting social community responsibilities. They recommended

certain practices inherent to the generation of an **affirmative mental health enhancing environment**, such as appreciative communication practices driven from a value perspective and the facilitation of enabling strategies to fulfil a need for knowledge and skills transfer (4.3.4). **Principle-centred leadership** transpired as critical to bottom line success, meaning that leadership practices were perceived to be driven from a source within, driven beyond own interest to collective interest. Satisfying managers' needs without sacrificing essential leadership responsibilities seemed like a healthy leadership strategy in the context of a cross-cultural M&A.

A **principle-centred leader** acts with integrity, remains in control of his or her emotions, relentlessly upgrades his or her team, acts in a way that he or she would like colleagues to act and makes sure that colleagues not only see the vision, but that they live and breathe it. Principle-centred leaders lend a helping hand to staff when needed, treat everyone equally well, disapprove of and refrain from unethical conduct and listen with the intent to really understand. They furthermore involve staff in decision-making processes, guide with questions not answers, engage in dialogue and debate, not coercion, and seek the truth without blame (Collins, 2001:88; Manning, 2007:22; Welch, 2005:63). **Principle-centred leadership** as a *way of being* cultivates personal and organisational security. It reflects confident behaviour of the self and others, guidance reflected by the direction provided to the self and the ability to execute goals efficiently.

As company leaders the **Chief Executive Officer** and the **Director of Organisational Development** were responsible first and foremost to achieve **personal credibility** based on **building trusting interpersonal relationships** with managers. They also had to create a context in which **managers could grow and develop through the realisation of enabling strategies** such as the specific Appreciative M&A team coaching programme. Ensuring healthy company culture integration for sustained performance was also on their business agenda. Company culture integration required **the alignment of the two corporate and national cultures, including key organisational components**, such as the key business drivers (Covey, 1999:32).

One of the key characteristics of a leader in this context emerged as **cultural sensitivity**. The company stakeholders had to identify the context they were working in at any given time and simultaneously change their behaviour and decisions to match that context (Snowden & Boone, 2007:75). They also had to prepare their organisation to appreciate the different contexts and the conditions for transition between them. To ensure a smooth M&A integration, the company stakeholders had to exhibit a deep understanding of the context, demonstrate the ability to embrace complexity and paradox, as well as have the skill to flexibly

change their leadership style (Snowden & Boone, 2007:76). The company stakeholders were thus **co-responsible** and **accountable for creating an affirmative mental health enhancing environment** that would activate a sense of personal and organisational security. Their world view and view of people were crucial aspects in directing how they dealt with human due diligence in the context of this cross-cultural M&A. In line with the Appreciative Inquiry programme approach these leaders should ideally role model the underlying principles of working from a positive frame.

Their **support for programme implementation was of cardinal importance**. Both the Chief Executive Officer and the Director of Organisational Development supported the notion of team coaching in this company. They established team and individual business coaching as a human capital strategy striving to ensure that the “collaborative synergies of teams are drawn to improve relationships, as well as performance” (Company Brochure, 2006:7). At the time of programme implementation (2003), Appreciative Inquiry was not practiced as an organisational change strategy in the company.

**Other indirect company stakeholders** included the **General Manager**, presenting the first line of managerial authority in the management team’s immediate work environment. The findings of the situational analysis indicate that the General Manager played an essential role in managing the change process (Chapter four), especially in building an environment that would cultivate managers’ sense of belonging. Dr. Mvulane (2008), who works in the field of positive organisational change in South Africa, remarked: “People join companies and leave their boss.” The focus of this section was, however, predominantly on the leadership roles employed by the Chief Executive Officer and the Director of Organisational Development as key leaders in this company.

### **5.2.3 Acknowledging The Context: A Hotel In Swaziland Situated Within A Southern African Hospitality Environment**

The **context**, a **104-bed bed hotel in Swaziland**, is presented as a light green rectangle within a darker green area that indicates the **Southern African hospitality environment** (Figure 5.1). Context is defined by Mowday and Sutton (1993:198) as “stimuli and phenomena that surround and thus exist in the external environment to the individual ...”. Johns (2001:32) points out that the context mostly operates in such a fashion that it either provides opportunities or constraints for human behaviour in organisation settings.

A lighter green oval shape in the centre reveals the **positive core** of organisational life in the interrelated sub-contexts. The **positive core** reflected the merged company’s resources,

assets and strengths (Cooperrider & Whitney, 2005:9). The value of the positive core is one of the greatest and largely unrecognised resources in the field of change management (Cooperrider & Whitney, 2005:8). This argument is linked to organisational tendency to focus on what needs fixing, rather than what gives “*hope and promise*”. The positive core was interwoven with the marginalised stories of “*hope and promise*” in this setting. These stories conveyed a crucial message to managers that they were valued, belonged and were part of the family. The positive core consequently emerged as practices that facilitated personal and organisational security (4.3.3). The lighter green oval shape in the conceptual framework recognises the promise of these opportunities that was integral to the cross-cultural M&A. It symbolises the environments’ potential for growth and indicates a deep spiritual connectedness. It further reflects the values of hospitality and generosity that were tangible in this service-oriented industry.

The use of different tones of green denote the paradoxical nature of the organisational environment, harvesting both the problem-saturated nature of the cross-culture M&A, as well as stories of hope and promise that co-existed. Notice the dotted line that indicates the boundary between the hotel and the Southern African hospitality environment; it shows the interrelated nature of the relationship between these two entities - an orientation to how the different components interact to create a greater whole.

A darker green was chosen for the Southern African hospitality environment, referring to a specific property and hotel owning group situated in a broader Southern African hospitality context. Green suggests ambition, vision and a future-focused orientation. The organisational environment – referring both to the hotel and the Southern African hospitality environment – encompasses the **internal and external organisational environment**. These two environments interact with each other in a dynamic way. There is also a **dynamic, interactive process** between the internal environment of stakeholders (management team, team coaches and company stakeholders) and the internal and external organisational environment.

Plunkett and Attner (1997:94) argue that the **internal organisational environment** is composed of elements within an organisation’s borders that company leaders create, acquire and utilise, consisting of the organisations vision, mission, core values, core competencies, leadership, culture, climate, structure and accessible resources. The **external organisational environment** includes certain forces exterior to an organisation’s borders that interact directly or indirectly with it, providing both challenges and opportunities (Plunkett & Attner, 1997:94). Here it referred to both the internal and external customers, suppliers, competitors, the labour force, economic conditions, legal and political forces, socio-cultural forces, technological

forces and natural forces (Plunkett & Attner, 1997:102–107). The Government of Swaziland was, for instance, an important external customer based on the lease agreement between the Government and the company. This impacted on certain maintenance activities especially related to the hotel structure and buildings, at times slowing maintenance processes down. Certain legal forces influenced labour practices, such as obtaining work permits for non-local employees. Socio-cultural influences, namely the influences and contributions from diverse groups both inside and outside the company, were a reality based on the cross-cultural nature of the acquisition that took place. Natural forces included the climate, weather, geography and geology that affected the way the business operated (Plunkett & Attner, 1997:106/107).

According to Hargrove (1995:7) the **internal organisational environment** represents the sum total of all the conclusions people in organisations have reached in order to succeed. It is shaped by the shared interpretations people make about the business environment, the existing business practices and business theories, and the core competencies that have been developed over time. It is furthermore shaped by the inherited or self-imposed management culture composed of a network of largely invisible but deeply felt assumptions, beliefs and attitudes.

The **cultural context** had a direct influence on the coaching process in this company and had to be considered in creating a framework for successful coaching. The **historical biases** expressed during the situational analysis indicated that managers perceived the organisational culture of the previous acquiring company as lacking inclusiveness and therefore strengthening a culture of diversity. This seemingly wounded internal commitment and involvement related to an impaired sense of belonging (4.3.2). Hargrove (1995:8) warns against a company that is seen as displaying autocratic governance, because these negative contextual perceptions give rise to all kinds of defensive behaviour. Coaching within a results-oriented framework may, therefore, be seen by primary coaching recipients as yet another attempt to control and to get more out of people.

An organisational culture of inclusiveness, on the other hand, incorporates systems integrity needed to sustain a culture of learning. Systems integrity incorporates a wholistic organisational mindset based on shared vision instead of vision from the top (Cooperrider, Sorensen, Yaeger & Whitney, 2001:79; Hargrove, 1995:11). The outcome of this kind of organisational culture entails building shared vision, empowerment and inspiring commitment, encouragement of team reflection and the coaching of managers for personal transformation and new skills.

#### 5.2.4 Programme Motivation

The motivation to implement and value the Appreciative M&A team coaching programme was **three-fold**. It commenced with an initial **request from the Director of Organisational Development**, representing other company stakeholders, to implement the programme based on two previous takeover experiences. The company's vision included growth through acquisitions. The request indicated company stakeholders' intent for a smooth integration process.

The **need for programme implementation** was additionally confirmed by the findings of the **situational analysis** in Chapter four (Figure 4.1). Managers portrayed the cross-cultural M&A as a paradoxical organisational change process with mental health threatening abilities. Consequently, they identified a need for an M&A programme that would unleash the generative potential inherent to the paradoxical nature of the M&A through the generation of an affirmative mental health enhancing environment. The situational analysis also provided **verification of programme applicability** in the context.

The **programme valuation component** was integrally linked to implementation. It was motivated by the fact that I was in possession of an existing M&A team coaching programme at the time, which had not been implemented yet. The credibility of the programme had thus not been established. In line with this reality it was deemed essential to refine, implement and value the programme in order to contribute a worthy M&A team coaching programme to the knowledge base of business coaching, with specific reference to the hospitality industry.

#### 5.2.5 Procedure For Implementing An Appreciative M&A Team Coaching Programme To Facilitate The Mental Health Of Managers For Sustained Performance

*"In therapy clients are driven by pain; in coaching they come out of passion for something they desire."* (Naughton, 2002:26)

The procedure of implementing the M&A team coaching programme in the context of a cross-cultural M&A was directed by distinct, yet compatible, paradigmatic perspectives as described in Chapter one, namely **Social Constructionism** (1.5.1) and **Appreciative Inquiry**, complemented by the **Theory for Health Promotion in Nursing** (1.5.2). The section that follows provides a description of the (a) **approach to the programme**, with reference to the **paradigmatic perspectives** and the **M&A team coaching process** that guided programme activities, (b) the **realisation of both stages of programme implementation**, incorporating

the programme's **short and long-term outcomes, programme activities and processes** to deliver and sustain the programme, as well as (c) **programme valuation**.

#### **5.2.5.1 Integrated Appreciative M&A team coaching approach**

The programme was realised in two interrelated programme stages that followed a logic sequence, namely the **M&A orientation intervention**, followed by the **M&A implementation intervention through ongoing team coaching** (Figure 5.1). A brief description of the **Appreciative M&A Inquiry, M&A team coaching process** and the **“construction kit”** used to actualise the programme follows. The purpose is to provide a backdrop of how the programme approach informed my decisions throughout programme implementation.

##### **a) Appreciative M&A inquiry**

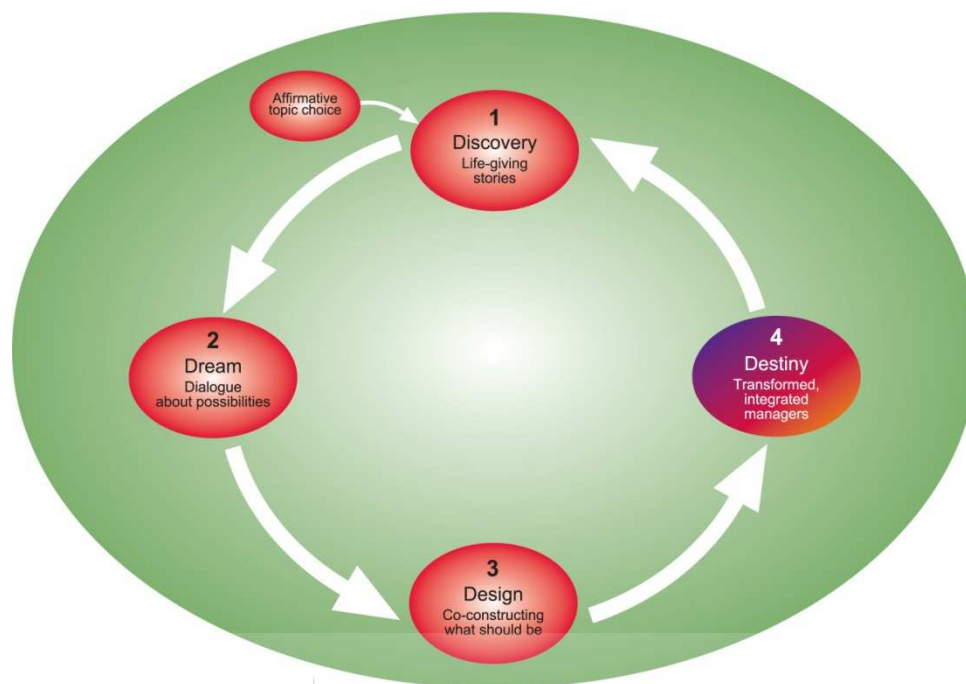
When I was exposed to Appreciative Inquiry during my masters' studies, I felt enriched. I stumbled upon a theory that resembled my assumptions about dealing with life's adversaries, namely that there is something to celebrate in every single situation no matter how bleak the situation appears. Bushe (2007:30) compels that “Appreciative Inquiry is not (just) about the positive.” In the context of this cross-cultural M&A the aim was to unleash relevant stakeholders' generative abilities as a liberating force to reconstruct a positive organisational future in spite of, or rather because of, the dominant problem-saturated discourse. The contribution of Appreciative Inquiry is on a paradigmatic, yet pragmatic level.

The following **eight assumptions** were adapted to form the foundation for the Appreciative M&A team coaching approach that guided programme implementation and valuation (Preskill & Coghlan, 2003:9/10):

1. In the context of this M&A process something works.
2. What stakeholders pay attention to become their reality.
3. Reality is a here and now construction and multiple realities are a reality in this context.
4. Reality is constructed through the language that we use in the triangular coaching relationship, and beyond.
5. The act of asking questions or the nature of dialogue in the triangular coaching relationship influences all stakeholders in some way.
6. Stakeholders have more confidence in journeying to the future when they carry forward parts of the past.
7. The parts that stakeholders carry forward should be what are best about the past.
8. It is crucial to respect differences and realise that stakeholders bring their whole self to work.

The Appreciative M&A Inquiry was actualised in four key stages, based on an adapted version of the Appreciative Inquiry 4-D cycle described by Cooperrider, et al. (2001:9).

**Figure 5.3 Appreciative M&A Inquiry 4-D cycle**



(Adapted from Cooperrider, et al. 2001:9)

The **discovery**, **dream** and **design** stages were predominantly the focus of attention during the **first stage** of programme implementation (M&A orientation intervention) (Figure 5.3). These stages are portrayed in red oval shapes with white centres, signifying the life-giving force of the Appreciative M&A Inquiry. **Discovery** represented the mobilisation of a whole system of inquiry into a positive change core. In this setting it was based on **affirmative topic choices** to ensure that desired outcomes were met, thus appreciating the best of “what is”, integrally to the “best of what has been” (Cooperrider & Whitney, 2005:16). It further entailed a focus on **life-giving stories** about the cross-cultural M&A to generate collective energy to deal with the problem-saturated nature of the change process. It signified the assumption that something worked in the context of this organisational change phenomenon (Preskill & Catsambas, 2006:11).

The **dream stage** incorporated “what might be” and “what the company was calling for” (Preskill & Catsambas, 2006:15). It included **dialogue about possibilities**, the strategic intent of the acquirer, developing a team identity, team values and constructing a team vision in alignment with the overarching vision of the acquirer. Cooperrider, et al. (2001:46) state: “The potential of a culture could actually be measured by the intensity, energy, and belief in its images of the future.”



The **design stage** entailed **co-constructing what should be**. This stage was crucial to ensure managers' past successes and visions for the future became concrete actionable realities. It implied the creation of new strategic direction through aligning operational standards, systems and processes with visions (Preskill & Catsambas, 2006:15). It incorporated the use of provocative propositions in order to bridge the best of "what was" with appropriate strategies of "what might be". **Provocative propositions** are defined as appreciative design statements which are written in the present tense representing elements of the organisation's social architecture (Preskill & Catsambas, 2006:20/21). It often **starts with a question**, because change is implicit in the very first questions asked, referring to the assumption that the act of asking questions or the nature of dialogue in the triangular coaching relationship influences all stakeholders in some way.

The **destiny stage**, realised through the implementation of the M&A implementation intervention, **represents the outcome** of the methods and processes realised as part of the first three stages of the Appreciative M&A Inquiry. It implied the execution of intended actions that were generated during the first three stages of the Appreciative Inquiry cycle to ensure the creation of transformed, integrated managers. It involved publicly declaring the commitment to live the provocative propositions or design statements, as well as continuously evaluating M&A integration results and sustaining change, thus building "hope and sustain momentum for ongoing positive change and high performance" (Cooperrider & Whitney, 2005:16). Describing it as the final stage of the Appreciative M&A Inquiry cycle is somehow misleading, because in reality these stages are not mutually exclusive and tends to repeat.

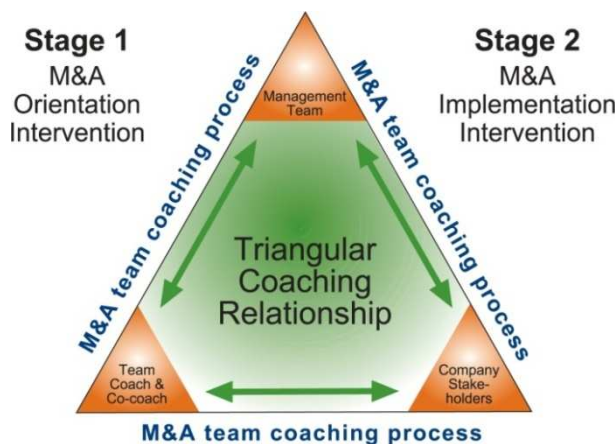
#### **b) M&A team coaching process**

According to Zeus and Skiffington (2002:60) the coaching process refers to the various phases involved in the establishment, progression and development of the coaching partnership. Yalom (1995:130) supports this view. He contends that it refers to the "nature of the relationship between interacting individuals". These relationships develop over time and are mirrored not primarily in the verbal content of interacting individuals' expressions, but also in the 'why' and 'how' of expressions, referring to the underlying relational dynamics (Yalom, 1995:131). It should be noted that the coaching process facilitated in this dynamic context of change involved fluid and flexible aspects of structure and process rather than a fixed set of steps.

The **M&A team coaching process** is presented in blue writing in Figure 5.1 and 5.4 below, surrounding the triangular coaching relationship. It consists of three interrelated phases that were embedded in the two programme stages, namely (1) **establishing the coaching**

partnership, (2) committing to action, encompassing a specific coaching cycle and (3) sustaining performance.

Figure 5.4 M&A team coaching process



The section that follows provides a summary of the M&A team coaching process. The realisation of these phases, with reference to task fulfilment in each, is reflected in the section addressing programme realisation.

**Establishing the coaching partnership** commenced during the situational analysis (Chapter four) and extended into the **M&A orientation intervention**. The main task at the time was to establish an **interactive partnership** with stakeholders mainly during the **discovery, dream** and **design** stages of the Appreciative M&A Inquiry cycle. An **interactive partnership** was essential to ensure programme commitment and involvement as requirements for sustained performance in this context. **Relevant coaching tasks** pertaining to this phase included initial **meetings** with the Director of Organisational Development and the management team to generate a deeper understanding of their needs and to build rapport. The objectives of the meeting with the Director of Organisational Development were to **discover the needs of the company**, to **reach an agreement on the coaching contract** and to agree on **programme logistics**. The objective of the situational analysis was to ascertain programme applicability based on a discovery of managers' experiences of the cross-cultural M&A. It also entailed negotiating an initial coaching agenda with them. Furthermore, it created contextual awareness related to potential challenges like cultural diversity, historical biases and distrust that might interfere with the establishment of a coaching partnership. These first meetings were critical to the success of the coaching intervention (Zeus & Skiffington, 2002:60).

Another relevant coaching task pertaining to this phase included the **establishment of a report to management**, unpacking the outcomes of the first stage of programme implementation and making recommendations regarding the second stage (Zeus &

Skiffington, 2002:60). The report was member checked with the team prior to distribution as a measure of trustworthiness. This phase extended over a period of three months, including the initial meetings with coaching stakeholders, the situational analysis and the first stage of programme implementation.

**Committing to action** pertains to the second stage of programme implementation, namely the **M&A implementation intervention** (Figure 5.4). It took place over a period of two years and nine months. It involved the actualisation of the **fourth stage of the Appreciative M&A Inquiry cycle**, namely generating *destiny* through the application of a **coaching cycle** that was continually refined throughout this period. **Committing to action** is an essential aspect to ensure that performance outcomes are met. Team coaching is an outcome-based results-oriented approach. Once an interactive coaching partnership is established, attention turns to maintenance and analysis of the partnership to ensure that performance outcomes are met. It is crucial that coaching stakeholders constituting the triangular coaching relationship should fully understand their specific role and responsibilities (Dembkowski, *et al.* 2006:12).

This phase involved a total of **24 four-hour team coaching meetings** as part of the M&A implementation intervention. It was envisioned that the ongoing team coaching would facilitate managers' integration into the new company culture, revealed in their ability to live the core company ideology, namely the "O" way. It involved an in-depth appraisal of how managers relate to themselves, others and the environment as manifested in the triangular coaching relationship. It also entailed commitment from us in our role as team coaches to prepare ourselves sufficiently for each coaching meeting through activities such as personal and collective reflective practices, attending the monthly coaching facilitators' meeting, reading relevant material, and ensuring that our coaching practices were in line with the company's coaching mandate and the managers' coaching needs and expectations. Ultimately it involved setting the scene for all relevant coaching stakeholders to take purposeful action.

As team coaches we followed a specific **coaching cycle** to generate movement from the problem-saturated reality of the M&A process to co-constructing hope and confidence, reflecting company culture integration. The coaching cycle encompassed the following steps presenting the flow in each coaching meeting:

1. Re-connecting and accountability checking
2. Negotiating and executing the agenda
3. Reflection, evaluation and feedback
4. Goals meeting
5. Follow-up and reporting

These steps are described in more depth in 5.2.5.2.b.ii to prevent repetition of information sharing in the thesis.

**Sustaining performance** pertains to the ultimate termination of the team coaching process in the context. We ultimately concluded the team coaching process after three years by conducting an in-depth valuation of the coaching process. This entailed individual qualitative interviews with managers focusing on their experiences of how the Appreciative M&A team coaching programme facilitated their mental health in a context of company culture integration. The Director of Organisational Development was also requested to value the programme as an important company stakeholder (Chapter six). Final follow-up activities entailed that we stayed in the setting, coaching the team for another year to prevent slippage. Up to date the team are still being coached by two internal company coaches based on the company's team-based approach and philosophy of lifelong learning.

Factors that influenced the time it took to move through each phase are identified in literature as the coaching skills of the team coaches, the complexity of the coaching mandates of different stakeholders, the team's readiness for change, the context and the quality of the coaching relationships. Zeus and Skiffington (2002:57) suggest that the coach should use his or her judgment, intuition and experience to determine the pace and timing of the coaching intervention. Although these phases were realised over a period of three years - commencing with the establishment of the coaching partnership and ending with a follow-up plan to sustain performance - each individual coaching meeting incorporated aspects of these three phases. I present these phases of the M&A coaching process in a linear fashion in the thesis to provide a logical theoretical framework. Personally, I did not experience the coaching process as being linear. I think coaches seldom do.

### c) **Appreciative M&A team coaching tools and techniques**

Specific **methods**, **tools** and **techniques** were used to facilitate all three stages of the Appreciative M&A team coaching programme. According to Stamps and Lipnack (*in* Cooperrider & Avital, 2004:43), **methods** include "principles, practices and processes". They contend that **theory** offers the lens for viewing social reality; **method**, on the other hand, embodies the "construction kit" used by practitioners to obtain desired results, consisting of specific coaching tools and techniques. The "**construction kit**" included numerous emerging tools and techniques that were accumulated in the **M&A team coaching toolbox**. It consisted of **two interrelated categories of tools and techniques**, pertaining to **care-giving** and **performance influencing** as mentioned in 5.2.1.2. The different tools and techniques assisted us in our coaching roles to achieve the desired programme outcomes and the

programme destiny ultimately. The emerging nature of the methods was linked to the dynamic nature of the coaching context and our personal growth and development as coaches. As we became more competent in our roles as team coaches, the kit became more contextual and tools better aligned to the coaching agendas of the stakeholders in the triangular coaching relationship.

Tools and techniques were mostly consciously chosen to achieve a specific end. At times, however, it was chosen from the gut to address here and now situations that needed attention. Intuition has emerged as a recognised core coaching competency in this context (Cooper & Sawaf, 2000:227; Dembkowski, et al. 2006:73). It is an ability which grows as the coach's skills develop and provides one of the hallmarks of excellence in coaching relationships.

The two major interrelated toolbox categories are described below to provide a theoretical framework of aspects that guided programme realisation, described in the next section. The section below aims to define the tools and techniques, complemented by a brief description thereof. The use of these tools is reflected in programme realisation (5.2.5.2).

#### c.i) **Care-giving tools and techniques**

Care-giving refers to rendering support with respect to the environment in which the change process takes place (Dilts, 2003:13). In this context it was embedded in an awareness of the role of the external and internal environment on managers' psychological processes and interpersonal relationships. These tools and techniques were thus predominantly chosen to enhance manager's psychological safety in a perceived context of paradox through building rapport.

**Care-giving tools and techniques** included: (1) providing a **safe physical environment** during contact meetings, (2) **rules of engagement and clarification of expectations**, (3) **warm-up activities, team games and small group work** (4) conscious application of **appreciative communication practices**, (5) **metaphor, analogy and narrative** and (6) **celebration activities**.

**Providing for a safe physical environment during contact meetings** was imperative to achieve optimal learning in this context. The way that the physical environment is structured during coaching meetings provide a "meta-message" about the kind of interaction expected of stakeholders engaged in the process (Dilts, 2003:13). In this context the set-up of different venues that were allocated throughout programme implementation was mostly done in a

rectangular fashion by conference staff. A flip chart or projector was situated at the front of the room. It was the standard way in which conference venues were set up. In hindsight, I realise that the set-up might have inhibited participation, based on the likelihood that managers might have interpreted it as a context for “presentation”, thus preparing themselves unconsciously to sit passively and listen (Dilts, 2003:13). Unconsciously we might have fostered a sense of hierarchy with us sitting at the top of the rectangular shape.

**Rules of engagement** refer to the norms that were set collaboratively as a measure of guiding interactions during coaching meetings. Ground rules encouraged managers to consider diverse views, to balance advocacy and inquiry, and to portray candour during team conversations (Hargrove, 1995:38). **Clarification of expectations**, as part of the initial contracting of each coaching meeting, aimed to ensure an inclusive coaching approach and to hold managers accountable for commitments (Hargrove, 1995:38).

**Warm-up activities, team games and small group work** involved the use of specific tools and techniques to enhance team engagement while fostering a sense of psychological safety. **Warm-up activities** were used during the first phase of each coaching meeting to establish the coaching partnership. **Team games** and **small group work** were chosen in alignment to session outcomes, to facilitate individual and team learning in a fun-filled, cooperative manner, integrating different learning modalities (visual, auditory and kinaesthetic).

**Appreciative communication practices** have already been described in section 5.2.1.2. I deemed these practices crucial to facilitate managers’ mental health: **listening deeply, generative conversations, generative questions, realness** and **speaking a language of appreciation**. Appreciative communication practices were guided by a **generative attitude** displayed by the team coaches during programme implementation.

The use of **metaphors, analogies and narratives** emerged as meaningful tools to manage the challenges inherent to our initial deficient understanding of the ethnic culture that influenced how managers made sense of the cross cultural M&A. Managers displayed a high level of metaphoric language fluency demonstrated by the use of metaphor filled language. According to Dilts (2003:21 & 22) metaphors and analogies allow us to draw parallels between one context or experience and another, leading to creativity and the ability to focus on the deeper structure of our experiences. Dembkowski, *et al.* (2006:105) support this notion and refer to the advantage of adopting a “story-telling mode” to create an atmosphere of psychological safety for clients. An example of a metaphor used during the M&A orientation intervention include a re-examination of the coaching process through the use of “soccer” as a parallel for coaching. Narrative or story-telling activities are an integral part of African culture.

It entailed the use of stories to create organisational and personal security and to foster a sense of belonging.

**Celebration activities** entailed techniques used to confirm the positive change core of the team as a whole. It included the yearly company-orchestrated celebration in the form of the team coaching breakfast. It also entailed the yearly award making meeting, techniques that focused on the generation of positive feedback such as “identify a level five leader in your team based on the criteria set out in the book *Good to Great*” (Collins, 2001:17–40), “write a blessing for the colleague whose name you have drawn and go on a shopping expedition and indicate ten ingredients of character that you think that team colleague needs to fulfil the blessing”. The last coaching meeting ended with the theme “celebrating what is right in your department”. It was embedded in the ability to facilitate a language of appreciation in the context of the team.

#### **c.ii) Performance influencing tools and techniques**

“One of the most important skills of coaching is helping people to define and solidify goals”, says Dilts (2003:37). In this setting it included a delicate balance between task and relationship to facilitate managers’ mental health for sustained performance throughout the course of the Appreciative M&A team coaching programme. The following **performance influencing tools and techniques** were used within an appreciative coaching framework: (1) **goals setting**, (2) **generative questions**, (3) **feedback practices**, (5) **assessment tools**, (6) **mentoring tools and techniques** (7) **homework assignments** and **reading material**.

Adequate **goal setting** was a key focus of coaching meetings. Managers were assisted to goals with high personal and team relevance, based on the topic and outcomes of each coaching meeting. These goals included both individual and collective goals and were guided by specific criteria, namely to be specific, measurable, attainable, relevant and time-based (Allwood, Gagiano, Gmeiner & van Wyk, 2002:43).

As team coaches we asked **generative questions** to shift managers’ attention from the perceived problem-saturated reality to the desired future destiny, as well as to reach mutual agreement on specific outcomes, such as: “What do you want as a team that you do not have already?”; “What benefits do you want from coaching today?” and “What do you want to be accountable for during this coaching meeting?” **Generative questions** additionally included questions that had the intent to value behavioural changes inherent to the coaching process. These questions were asked to create awareness of possible shifts that occurred in individual

and team performance, such as: “From the last coaching meeting, until now, what have you done differently?” It also entailed the checking of limiting assumptions. A non-threatening way to structure these questions emerged as: “What about...?”

As team coaches we regarded the facilitation of continuous **feedback practices** as an important tool to assess managers’ personal, relational and operational performance in this context. It was also underpinned by a conviction that deficient positive feedback can damage the performer-coach relationship and cause performers to give up (Dilts, 2003:53). Multiple types of feedback were thus practiced to facilitate and sustain self-initiated changes in individual and collective behaviour, namely **reflective feedback**, **reality checking** and **accountability checking feedback**.

**Reflective feedback** included feedback from us in our role as team coaches in the form of observations about particular individual and team behaviours, both constructive and possibly harmful in terms of sustaining performance (Dilts, 2003:53). Other forms of reflective feedback included **reflective dialogue** between the team and us during coaching gatherings. **Reflective letter writing** additionally portrayed dialogue between the team and us based on reflective feedback (Appendix 7.2). The use of reflective letters during the second stage of programme implementation had practical benefits in this context. It provided us with the opportunity to generate a deeper understanding of managers’ personal and collective realities and raised significant questions that often triggered a next level of reflection. Gmeiner and van Wyk (2006:55) contend that the use of reflective letters as a coaching tool provides coaches with the opportunity to integrate coachees’ learning on different levels. The use of **reflective questions** was at the heart of reflective feedback, namely questions that enabled managers to reflect on their learning, experiences and actions. As time passed reflective feedback was modelled to such an extent that managers started to imitate the process, giving feedback to each other regarding behavioural aspects influencing team performance. Managers additionally **member checked** the coaching logging reports, thus providing reflective feedback in yet another form (Appendix 7.5).

Another form of feedback entailed **reality checking feedback** based on the intent to reconnect with the team through the use of **re-connecting questions** (“How is the team right now?”) and the use of **projective techniques**. Projective techniques refer to the use of tools and techniques such as drawings that elicit a heightening self- and team awareness to establish team progress. Different reality checking activities were used as a first step during each coaching meeting as a way of re-connecting with the team.



**Accountability checking** was yet another feedback technique that focused on the generation of anecdotal evidence, such as proof of goal achievement, completion of homework assignments and behavioural shifts. Evidenced-based coaching is described in literature as one way to demonstrate returns on the coaching investment or to give proof that a specific coaching intervention is effective (Stober & Grant, 2006:5). Accountability checking feedback invited self-assessment for example: “How do you stop yourself as a manager or a team from executing a self-selected goal?”

**Assessment tools** were used to enhance personal and collective insights as a basis for sustained performance. These tools assisted in the valuation of managers’ strengths and developmental areas. Developmental areas included knowledge, performance gaps and/or attitudinal gaps. The selected assessment tools facilitated **self-assessment** as an integral part of the assessment process, such as emotional intelligence mapping (Cooper & Sawaf, 2000:324–345), personal leadership assessment and mapping of support systems. **Peer assessment** tools used during the M&A implementation intervention specifically included the 360° feedback tool (Bennett, 2006:53–54; Dembkowski, *et al.* 2006:93) and the yearly strengths, weaknesses, opportunities and threats (SWOT) assessment of the team coaching process. I agree with the advice reflected by Dembkowski, *et al.* (2006:95) that a coach should make use of assessment tools, but should not solely rely on them to gain understanding of a client’s situation.

**Mentoring tools and techniques signify** “the informational aspect of learning and performance as much as it does the mastery of tasks” (Dilts, 2003:127). The mentoring role is not the same as the coaching role. In this context we complemented coaching with mentoring, based on individual and collective needs that required the establishment of key values and beliefs, as well as a need to address learning needs in a pragmatic way. Mentoring tools and techniques incorporated **value alignment**, referring to the alignment of managers’ **personal values** to the **values** of the **team** and **company** at large, followed by information anchoring. **Value alignment** was a key measure to sustain performance and to generate commitment to action plans based on what was important to the members forming part of the triangular coaching relationship (Figure 5.1). O’Connor and Lages (2004:38) define values simply as what are important to individuals. The process of value alignment commenced during the situational analysis as a way of honouring managers’ M&A experiences and their internal value system related to the cross-cultural M&A (Chapter four). It extended into the first and second stages of programme implementation to ensure congruity between all facets pertaining to the individual manager, to support processes with reference to the programme destiny, as

well as to ensure environmental alignment, in which the goals and actions of individual managers and the team congruently fitted the larger system (Dilts, 2003:143).

**Value alignment** was facilitated in this context by information anchoring regarding the company's core ideology and values, as well as continuous re-anchoring of personal, team and company core values through the facilitation of team activities such as "creating a clear team identity". Another method entailed a value clarification inquiry of how managers' personal values of fitted company value system aligned to information integral to managerial performance, such as financial indicators of success (turnover, running cost of the hotel, profit) and human due diligence aspects (staff satisfaction, retention, engagement).

**Homework assignments** and **reading material** were actively included in the team coaching process based on the assumption that internalisation of learning can best be facilitated if learning is a continued process. An example of a relevant homework assignment is reflected as part of the coaching logging report in Appendix 7.5.

The **practical application** of the **Appreciative M&A Inquiry cycle**, merged with the **M&A team coaching process**, is described next. The use of **relevant coaching tools and techniques** are central to the description.



#### **5.2.5.2 Realisation of an Appreciative M&A team coaching programme**

Here is the abbreviated story of a quest for mental health facilitation in a context of a cross cultural M&A. Note that the story is process - rather than content-focused. It aims to elicit how I achieved the overall programme destiny through an integrated Appreciative M&A team coaching process, merging Appreciative M&A Inquiry and an M&A team coaching process. Verbatim quotations of stakeholders, in *italic format*, provide evidence of the contributions of stakeholders and in particular of managers' experiences of the process of programme implementation and valuation.

##### **a) Stage one: M&A orientation intervention**

The **long-term outcome** of the **M&A orientation intervention** was deduced from the findings of the situational analysis (Chapter four). Managers called for the co-construction of an affirmative mental health-enhancing environment to sustain positive change needed for company culture integration. The related **short-term outcomes** were: (1) to share mission

critical information to strengthen personal and organisational security, (2) to co-construct 'an agreed upon' transition plan towards managing the change process as a team, (3) to co-construct a mutually 'agreed upon' team vision and (4) to facilitate managers' relationship with the self, others and the environment through the use of relevant coaching tools and techniques to sustain change (3.4.5.1).

In essence it entailed including managers in strategic planning through Appreciative M&A Inquiry and the practical application of the first stage of the M&A team coaching process, namely to establish a coaching partnership. The intervention focused predominantly on human due diligence. It aimed to merge the two company cultures early in the acquisition process by inviting the managers to become team players. Alignment of personal and organisational objectives started here (Visagie, 2007:20). As set out in Chapter three, the programme was additionally anchored in the following M&A integration foundations, namely **orientation, planning, collaboration, buy-in, management of expectations and ownership** (Visagie, 2002:116/117).

The tale of the M&A implementation process, realised through the M&A orientation intervention, follows with attention to:

- Acknowledging the context
- Living the M&A orientation intervention
- Unfolding team dynamics and process
- Valuation of the M&A orientation intervention

#### **a.i) Acknowledging the context**

The seven managers who were involved in the situational analysis attended the M&A orientation intervention. They represented the management team. The intervention took place from the 10<sup>th</sup> of March to the 14<sup>th</sup> of March 2003. I proposed in the previous research that this stage "starts on the day of officially acquiring the merged company" and that it "will last for five days" (Visagie, 2002:116). The real-life context of M&As does not always allow for immediate integration interventions. In this context, managers were on a probation period for three months after the official takeover (December 2002). Immediate programme implementation was jeopardised by this process, adding to managers' initial distress and sense of personal and organisational insecurity.

The programme venue was a boardroom in the acquirer's head office in Johannesburg. The participants stayed in one of the acquirer's hotels adjoining the head office building. This was

purposefully planned to foster integration. It was envisioned that it would provide managers with the opportunity to meet direct and indirect company stakeholders, managerial staff, head office personnel as well as other colleagues.

The Director of Organisational Development was an important stakeholder in the initial programme planning stage. She provided valuable input based on her knowledge of what the acquirer's Chief Executive Officer wanted regarding the programme. The Chief Executive Officer was invited to participate in programme implementation so that the team could meet him. Other stakeholders included myself, fulfilling both a coaching and research role, Annie who joined us from day three onwards, as well as two managers who were previously involved in an M&A process in the company. Annie assisted me with taking field notes as part of her field work activities.

#### **a.ii) Living the M&A orientation intervention**

The following account aims to provide a pragmatic description of how the first three stages of the 4-D Appreciative M&A Inquiry cycle were realised during the M&A orientation intervention, namely: (1) **discovery of life-giving stories**, (2) **dream: dialogue about possibilities** and (3) **design: co-constructing what should be**, complemented by affirmative life skills coaching and celebration activities (Table 5.1). The M&A orientation intervention consisted of 12 sessions in total. These sessions aligned programme outcomes to specific affirmative topic choices central to the Integrated Appreciative M&A team coaching approach described in 5.2.5.1. The second stage of programme implementation, namely the M&A implementation intervention, refers to the actualisation of the destiny stage of the Appreciative M&A Inquiry cycle and focused mainly on the actualisation of the M&A team coaching process (5.2.5.1.b).

The outline of the M&A orientation intervention to facilitate managers' mental health, reflected in Table 5.1, differs in some aspects from the proposed outline in Chapter three. These differences should be understood in relation to the ongoing refinement activities that guided programme implementation.

**Table 5.2 Outline of an M&A orientation intervention to facilitate managers’ mental health**

Appreciative M&A Inquiry	Affirmative topic choices
<p><b>Stage 1 <i>Discovery</i>: Life-giving stories</b>  <b>Outcome:</b> Discovery of new meaning: Appreciating the best of “what is”</p>	<ul style="list-style-type: none"> <li>• Session 1: Affirming the acquirer through storytelling</li> <li>• Session 2: Recalling best previous team experiences to appreciate the best of “what is”</li> <li>• Session 3: Sharing strengths as a leader</li> <li>• Session 4: Sharing your personal history with the team</li> </ul>
<p><b>Stage 2 <i>Dream</i>: Dialogue about possibilities</b>  <b>Outcome:</b> Develop a dream about “what might be”</p>	<ul style="list-style-type: none"> <li>• Session 5: The “O way” - company management philosophy</li> <li>• Session 6: Envisioning a new team identity</li> </ul>
<p><b>Stage 3 <i>Design</i>: Co-constructing what should be</b>  <b>Outcome:</b>Co-construction of best integration practices as a road map to achieve the intended destiny, complemented by affirmative life skills coaching and celebration activities</p>	<ul style="list-style-type: none"> <li>• Session 7: Creating a new culture through the formulation of best integration practices</li> <li>• Session 8: Selling the co-constructed strategic intent and best integration practices to company directors</li> <li>• Session 9: Fire drill and building a paper tower</li> <li>• Session 10: Time competence – the survival guide</li> <li>• Session 11: Message of appreciation – celebrating individual potential</li> <li>• Session 12: Award giving ceremony</li> </ul>

Note that the realisation of stage four, ***Destiny***, was the focus of attention of the second stage of programme implementation and is described in section 5.2.5.2.b.

- **Stage 1 *Discovery*: Life-giving stories**

**Day one** kicked off at 08:00. All seven managers were present. We met in the boardroom. I was excited, though nervous. This was my first official step as a team coach entering the business landscape. At that point I was oblivious of the extent of growth that would transpire

in terms of personal independence over the next three years related to my engagement with the team and the context. I instinctively reverted to my internalised advanced psychiatric nursing skills, especially in relation to group psychotherapy. Yalom's (1995:xiv) words were ringing in my ears: "... interpersonal interaction is crucial in group (work). The truly potent ... group first provides an arena for group members to interact freely with each other ... and ultimately enables them to change...".

The programme thus commenced by using **care-giving tools and techniques to provide a safe physical and psychological environment** in order to create shared meaning in the process of change, consequently celebrating a new partnership between the acquirer and the target company (Visagie, 2002:117). Alleviating fear and uncertainty was set as a crucial objective through organisational socialisation, meaning that managers should become familiar with the organisation's story of origin, values, norms, procedure and culture (Plunkett & Attner, 1997:659). In line with these outcomes, **information anchoring** took place related to an orientation to the programme, focusing on the outcomes and outline for the five days. Managers additionally received a workbook that contained relevant information.

Next **expectations** were clarified related to the M&A orientation intervention and **rules of engagement** shared through the facilitation of a discussion around these aspects. Collaboratively crafted expectations indicated the team's desire for knowledge, skills and attitudinal transfer in a pragmatic way, portrayed by the following expectations: "*knowledge about the company and to know that they expect*", "*improved teamwork, unity and team relationships*", "*personal development and awareness*", "*opportunity to meet other role players in the company*", "*improved communication between the team and the company*" and to "*see the vision and to connect it to the team.*" **Rules of engagement** included "*be on time*", "*be open and honest*", "*participate*" so that "*all voices*" are heard and "*having fun*".

Initial **warm-up activities** were chosen to facilitate interaction from an appreciative stance, allowing managers to engage with each other and to provide positive feedback. One activity entailed randomly pairing off managers and asking them to confide in each other, sharing their passions in life. Each member then introduced his or her partner to the team with snippets of information based on personal qualities identified from their initial pairing off. This created an opportunity for managers to enhance their communication skills and get to know each other on a personal level. The concept of team coaching was explained to managers through the use of a soccer **metaphor** to link information to an existing cognitive framework.

**Discovery of new meaning through appreciating the "best of what is"** encompassed four sessions based on specific **affirmative topic choices**, namely (1) affirming the acquirer

through storytelling, (2) recalling best previous team experiences to appreciate the best of “what is”, (3) sharing strengths as a leader and (4) sharing your personal history with the team (Table 5.1).

### **Session 1: Affirming the acquirer through storytelling**

This session involved meeting selected company stakeholders and listening to their stories of previous M&A engagements. The first two people selected for participation in storytelling were the Chief Executive Officer and the Operations Division Manager. The outcome of this session was to enhance managers’ sense of personal and organisational security through the facilitation of a storytelling meeting with company stakeholders. The distribution of mission critical information, such as the company’s vision, mission, current operating strategies, products and previous stories of successes and challenges were integral to this process (Bushe, 2001:13). The Chief Executive Officer began by sharing a personal account of his history, including the history of the company and how he overcame obstacles to achieve his dreams, thus reflecting previous stories of success and challenges. He commenced by saying: *“To contemplate the future, you need to understand the past...”*. The company name was explained, as well as the vision, the coaching concept, the quest for excellence and the value of clear goal setting. The Chief Executive Officer emphasised the importance of believing in *“what is possible”*, that *“every human has the potential to be a champion”* and *“that ordinary people can make a difference”* (Chief Executive Officer, 2003). In conclusion he shared that the mission of the company is to become a *“world scale company ... a top class champion company...”*. The Operations Division Manager positioned himself in the role of a silent participant. The session ended with open questioning time. The managers seemed hesitant to ask questions. After the departure of the two gentlemen, however, the managers discussed the value of this contribution in positive terms.

This was followed by two line managers sharing their stories of previous involvement in M&A activities in the same company. The outcome, in line with creating an appreciative environment, was to create a sense of identity and hope. Hubbard (1999:20) is of the opinion that, when new employees perceive the acquirer as understanding of their realities of procedural and cultural differences, it results in higher productivity and willingness to stay on in the acquired company. These two managers touched on the M&A change themes of uncertainty and ambiguity, operational challenges, resistance to change and shared recommendations on how to deal with the change in a constructive fashion by taking *“the cultural side into account”*.

## **Session 2: Recalling best previous team experiences to appreciate the best of “what is”**

**Day two** commenced with a **warm-up activity** in the form of a name game to sustain the appreciative atmosphere that emerged during the first day. Managers shared the meaning of their names with each other. The Appreciative M&A Inquiry process continued with an inquiry regarding “best previous team experiences” aligned to appreciating the best of “what is”. The team was divided into two smaller groups and requested to recall their “best previous team experiences” and to present it in drawing form on the flip charts provided. Active participation was noted in the small groups. Members moving into leadership positions were clearly noted. This activity was embedded in the Appreciative Inquiry assumption that stakeholders have more confidence to journey into the future when they carry forward the best parts of the past (Preskill & Coghlan, 2003:10).

In the original programme that transpired from my masters’ research, I suggested a session that would focus on the team’s experiences of the change process so far (Visagie, 2002:120). This topic was the point of attention during the situational analysis conducted prior to programme implementation (Chapter four). I therefore decided not to re-visit this topic formally as part of this stage of programme implementation. My decision was furthermore strengthened by a perception expressed by some members that *“the bad stuff belongs to the past”*. It was also confirmed by my personal observational notes reflecting that managers’ behaviour indicated an increased acceptance of the past. Carrying forward the positive core of the change process therefore seemed like the best option.

## **Session 3: Sharing strengths as a leader**

The outcome of this session was to facilitate **appreciative dialogue** regarding managers’ personal strengths as leaders in this company. During the process of appreciative dialogue, feedback was elicited from managers regarding the “best of what is” in terms of individual managers’ leadership attributes. The team was asked to discuss one member at a time, focusing on his or her personal strengths as a leader, and how it contributes to operational efficiency at the hotel. General guidelines for giving and receiving meaningful feedback were negotiated. The member who was receiving feedback was requested to listen to the feedback from other members without interrupting the process. Questions could be asked afterwards. This was to ensure that managers could receive the feedback without interfering with the flow of the feedback process. When giving feedback managers were counselled to talk straight, but with respect, and to focus on changeable behaviour, not personality traits. These guidelines contributed to a meaningful learning environment based on values of honesty and generosity of spirit, both in giving feedback on strengths, as well as on areas that needed improvement.



Active participation transpired. It was interesting to note that the managers did not only focus on each others' strengths. The discussion also entailed feedback regarding each others' personal growth areas, even though it was less dominant and shared in a caring way, such as "*M is dedicated and committed ... he has a strong need to be accepted...*", "*E is a quiet somebody ... he doesn't push out his emotions ... doesn't like conflict...*" and "*T is brilliant but he confuses you...*".

Next, managers were requested to reflect on their personal perceived strengths as a leader (best of "what is"), their hopes for themselves as leaders in this company (what might be) and their beliefs about leadership in general (what should be). The session concluded with listing the characteristics of a leader according to their views. The final question was: "How will you use this feedback?" This was done to create personal goals from the position of new awareness that transpired as a result of this dialogue.

#### **Session 4: Sharing your personal history with the team**

This session entailed a conversation regarding "who are you as a manager in this company", focusing on personal passions, interests and future dreams. The outcome was envisioned as creating a heightened sense of personal and relational awareness related to the self of the manager. Managers were requested to draw a genogram depicting their family of origin. A genogram presents a diagram of a family over three generations, aiming to lay out a person's family background (Goldenberg & Goldenberg, 1996:181). Managers were informed to present their personal genogram in pairs rather than in the bigger group. The reason for this was to alleviate anxiety that might have been related to self-disclosure. Self-disclosure is a process through which people share personal information based on their value orientations (Weber & Carter, 2003:31). Yalom (1995:145) agrees that it is easier for group members to work in small subgroups, especially when they learn that there is another member with similar fears or concerns. Family of origin theory postulates that the patterns of family relationships influence human work-related behaviour such as responses to stress and anxiety. The theory suggests that it is possible to change ineffective behaviour as an adult, by reliving and reshaping some of these relationships in carefully facilitated ways (Kerr & Minno in Senge, et al. 1999:270–271).

- **Stage 2 Dream: Dialogue about possibilities**

Developing a collective dream about "what might be", aligned to the company's strategic intent, was embedded in dialogue about possibilities (Figure 5.1). To ensure realistic dreaming it was deemed important to share mission critical information with managers regarding the company's strategic direction, key business drivers, the corporate culture, management

philosophy, procedures and processes. **Day three** comprised of two sessions focusing on current organisational realities or the “what is” phenomena in order to create an ideal picture of “what might be”, namely **the “O” way** representing the management philosophy of the company and a session aspiring to **envision a new team identity** (Table 5.1).

### **Session 5: The “O way” – company management philosophy**

The “O way” was a prescribed way of being in the company embedded in the company’s core ideology. It served as a tool to provide strategic direction. The **outcome** of this session was to distribute information regarding the company’s management philosophy and how it impacts on the company’s strategic direction. A power point presentation was conducted introducing the team to the **corporate structure, vision, mission, key business drivers, strategic direction** and an **outline of the “O way”**, including the prescribed management behaviours. These different aspects were unpacked and linked to daily operations. This session also included dialogue about **“coaching versus team building”**, followed by a discussion of the **process of performance management** in the company.

The **performance management** component was facilitated by the Director of Organisation Development and an internal colleague with specialist knowledge of the company’s performance management strategy. The **outcome** was to introduce managers to the company’s performance management strategy and to lay the ground work for them to manage this process effectively. Performance management systems are often resisted. Managers must understand and agree with organisational definitions of standards in order to ensure cooperation. It was thus important to prepare managers not only to compile their own job descriptions, but to manage this process with their subordinates according to set standards. A sample job description was provided, indicating the key performance areas, key result areas and key result indicators as specified for this specific position. In order to assess managers’ insight into this area, they were requested to select one job that they could all relate to as a team and compile a job description.

### **Session 6: Envision a new team identity**

This session aimed to facilitate the **development of a new team identity** in an attempt to integrate the two organisational cultures (Visagie, 2002:120). It was grounded in the preceding sessions, namely appreciating the best of “what is”, as well as the above information sharing sessions that focused on guiding organisational realities or guiding “what is” realities. It was further a reflection of the Appreciative Inquiry assumption that our reality is an outcome of what we focus on.

**Outcomes** included crafting of a team vision, mission and values that were aligned to the organisational vision. Managers were requested to brainstorm the “ideal” shape of the merged team with specific reference to what the team stands for, implying alignment of the company’s strategic intent with the intent of managers. They were requested to present their strategic intent to the Chief Executive Officer and the Operational Divisions Manager the next morning with reference to core values, a collective name, vision and mission.

They preferred to work as a unit on this project, instead of in the suggested smaller groups, indicating a shift in team engagement. They were asked, prior to the session, to bring along a team symbol that would represent the team’s character. I did not specifically ask them to create two provocative propositions as indicated in the original programme (Visagie, 2002:120). This decision was based on simplifying the process, while including a cultural artefact as an additional source of understanding. The team commenced feedback by presenting the symbol to us (Figure 5.5). It was a statue of five people supporting each other, representing “*team work*”. The concrete foundation signified the spiritual orientation of the team, reflected by a statement that “*the Lord should be brought into the team*” and “*the Man above knows everything*”. It furthermore portrayed the strong family orientation of the team: “*we are a family based on this foundation ... we fly together ... do it in unity and love, in fairness, from an open platform ... the sky is the limit...*”. The atmosphere was one of serenity. They concluded that the symbol presented a marriage between “*traditional and Western ways.*”

**Figure 5.5 Artefact presenting the team as a “family”**



Active participation transpired. The only South African team member moved into a strong leadership position. The team elicited a list of 17 values. Next, they had to select their core values based on a consensus discussion. They chose the following values: stability, direction,

leadership, honesty, hospitality, endurance, perseverance, and empowerment. Their team name emerged as the “*Lukwethi*” team, a Siswati word meaning “*the brightest star*”. Their vision was “*to be the best management team within the O group*”. They compiled the following mission: “*To create and provide direction within the working environment through honesty and hospitality by empowering ourselves and other personnel, to enhance stability and prosperity within our working and personal lives*”. Their mission statement was a clear reflection that these managers did bring their whole selves to work.

- **Stage 3 Design: Co-constructing what should be**

**Day 4** focused primarily on **culture integration and building team morale** based on the **design** stage of the Appreciative M&A Inquiry (Figure 5.1). It represented the **co-construction of best integration practices** as a road map to achieve the intended destiny (transformed, integrated managers demonstrating internalised mental health behaviour for sustained performance) integral to “what should be”. The design of a roadmap was complemented by affirmative life skills coaching and celebration activities intended to celebrate individual and collective potential. The outcome of these combined activities was to deliver operational performance indicators proposed to measure collective achievement in driving the change process successfully, as well as to facilitate personal, relational and environmental awareness. The **design** stage consisted of six sessions based on the following **affirmative topic choices**: (1) creating a new culture through the formulation of best integration practices, (2) selling the newly crafted strategic intent and best integration practices to the company stakeholders, (3) fire drill and building a paper tower, (4) time competence: the survival game, (5) message of appreciation: celebrating individual potential and (6) award giving ceremony (Table 5.1).

**Session 7: Creating a new culture through the formulation of best integration practices**

The **vision**, **mission** and **values** were re-visited and a group discussion encouraged regarding “best integration practices”. The team identified a need for a management strategy that will “*decrease stumbling blocks such as ... the three R’s*”, namely “*resistance, resentment and revenge*”. The need increase “*motivation*” and “*buy-in*” from lower categories of staff was also identified. I presented an example of possible “best integration practices” to them following a discussion with the Director of Organisation Development. The team used this example as a frame of reference and crafted “best integration practices”. The outcome of this discussion was a **collaboratively crafted list of key performance areas, key performance indicators and objectives including productivity, training, staff morale and health and successful management**.

It is interesting to note that the team did not include all the suggested items. They also labelled some of the categories differently. Instead of talking about participatory management, they referred to “*staff morale and health*”, and “*successful management*”. “*Communication*” was identified as a key performance indicator amongst other to facilitate “*staff morale and health*”. The objective was “*happy, healthy staff, no complaint or resentment*”. What was this telling us about the context?

A clear strategic action plan with starting and end dates and clear assignment of responsibilities, as urged in the initial programme, was not achieved. As the primary team coach I take responsibility for not meeting this outcome completely. This was the first time that we entered the business arena to facilitate processes on a strategic level. I found it quite daunting. The team battled to craft measurable outcomes. It seemed as if the team as well as our own confidence levels did not support this activity. In hindsight it might have been the result of a process of transference and counter transference between the team and us.

### **Session 8: Selling the co-constructed strategic intent and best integration practices to company directors**

The Chief Executive Officer and the Operational Division Manager were invited to receive feedback from the team regarding their strategic intent. Feedback focused on aligning the newly crafted strategic intent to the performance outcomes of the acquirer. The South African team member commenced with the presentation of the vision, mission, values and best integration practices. Both the Chief Executive Officer and Operational Division Manager affirmed the team’s contributions. They expressed their commitment to render their support in driving the strategic intent (“*we will support and encourage you to be the brightest stars ... most important is to empower yourself ... we can provide the means, guidance...*”). The Chief Executive Officer shared ideas regarding performance management amongst others and the role of responsibility (this decision might have been influenced by the team’s objective of “*no complaint or resentment*” from the lower levels of staff). The Chief Executive Officer reiterated his view that “*in life, it is our job to help people ... not to rescue them ... we can help but not solve their problems ... if it affect their work performance it becomes a problem ... the responsibility to change is yours...*”.

Two **affirmative life skills coaching sessions** were next, namely (1) fire drill and building a paper tower and (2) time competence: the survival guide (Table 5.1). Life skills coaching aimed at fulfilling managers’ need for knowledge and skills transfer on a personal level, thus facilitating intra-personal awareness that could be transpired to improve interpersonal relations as well as work-related team performance.

### **Session 9: Fire drill and building a paper tower**

The outcome of the “fire drill” activity was to create awareness of individual and team responses to a specific challenge, such as an imaginary fire. The “paper tower” activity focused on creative problem-solving techniques. The team was requested to divide into three smaller groups. They were provided with newspapers and cellotape and requested to construct a tower. The team with the highest free-standing tower won. These sessions were discussed and linked to team work. Managers interacted freely with each other. They laughed and clearly had fun. I concluded with the following question: “How do you connect this to your team?” The team realised that, as individuals, they were “*different*”, and thus brought “*different attributes*” to the team. They also realised that a high level of “*care*” existed in the team, expressed by this comment: “*People care more about others than themselves...*”.

**Day 5** implied a **continuation of life skills coaching** with the session that focused on **time competence**. Time competence is a valuable tool to meet individual and collective outcomes.

### **Session 10: Time competence - the survival guide**

The outcome of this session was to assess managers’ time management competence on an individual level and to develop strategies to bridge identified areas of growth in this regard. Managers received a form on which they could identify their internal and external time wasters with potential solutions to each. Techniques and tips for effective time competence were discussed, as well as potential action steps that would ultimately support sustained performance.

The last day concluded with two celebration activities that honoured individual managers and the team as a collective entity, thus embracing a new beginning, namely, (1) message of appreciation – celebrating individual potential and (2) award giving ceremony (Table 5.1).

### **Session 11: Message of appreciation – celebrating individual potential**

Team members were requested to write a message to each other, as well as to us, based on the following prompts:

- You have contributed to this team by....
- What I appreciate about you is...
- I would like to personally thank you for...

These message sheets were distributed to all relevant stakeholders, followed by a discussion. The two central questions asked were: “What did you experience when writing the messages?” and “What was your experience of the feedback?” A strong theme of appreciation emerged between managers based on the value of standing still and reflecting

upon each other from an appreciative stance, even though it was experienced by some as a challenging experience in terms of truly focusing attention on others (*“it was difficult to put into a few words what you feel ... it was a bit of a struggle”*). One manager was respectfully confronted with his tendency to expand on topics. The team demonstrated more willingness to disclose personal information, as well as to confront each other with behaviour that might interfere with meaningful team interaction.

### **Session 12: Award giving ceremony**

The outcome of this activity was to honour managers for their unique contributions towards the overall programme success. **Certificates** were made with a strong focus on the individual qualities of each team member as it emerged during the name-sharing discussion. It became public knowledge that the different names were underpinned by values that had the potential to strengthen the team collectively, such as trust, hope and faith, worth, gratitude, peace, dedication, aspirations and dreams. The certificates thus aimed to affirm managers for their personal investments in the team as a collective entity. The certificates were presented to them by the Director of Organisation Development.

The first stage of programme implementation was concluded by a **focus group** that validated the programme, based on managers' experiences of the worth of the programme, as well as their recommendations for future programme refinements. The findings of the focus group are reflected in the programme valuation section 5.2.5.2.a.iv. A description of the unfolding team dynamics follows.

#### **a.iii) Unfolding team dynamics and processes**

A summary of the team dynamics and process is the focus of this section. The **team process** refers to the nature of relationships between interacting individuals, as well as patterns of action over time (Stamps & Lipnack *in* Cooperrider & Avital, 2004:44; Yalom, 1995:130). I agree with Yalom (1995:147) that beneath “each sentiment expressed there are layers of invisible, unvoiced ones”. As team coaches we addressed the team dynamics and process intentionally as it unfolded in each session of both programme stages, looking for shifts in personal and professional performance. Cilliers (*in* Maritz, 2006:70) indicates that the coach is an attentive practitioner who interprets the hidden and dynamic aspects of the organisation, work group and the individual involved. The focus is on relatedness and how authority is psychologically distributed, exercised and enacted. It involves a consideration of attitudes, beliefs, fantasies, core anxieties, social defences, patterns of relationships and collaboration, and how these in turn may influence task performance.

**Day one** reflected an **initial strained atmosphere** manifested by reluctance of the managers to engage in dialogue. The flow of communication was directed through me, indicating a lack of spontaneous free-flowing communication. This behaviour pattern is predictable in new groups or groups in changing contexts. Members look to the leader for structure and answers, as well as for approval and acceptance (Yalom, 1995:296). One well known team development theory hypothesises four development stages, namely forming, storming, norming and performing (Yalom, 1995:297). According to Whitmore (2003:146) the first demand of a team coach is to fully understand these team development stages in order for the team coach to accelerate the process.

A **shift in individual and collective engagement** was noted after an explanation of team coaching through the use of a **soccer metaphor** (day one). It seemed as if the managers could relate to this metaphor and participation increased thereafter. During tea time a singular manager joined me to discuss the moral implications of bigamy. It was disclosed during the introductions that two of the managers had more than one wife. It seemed as if he needed acceptance in our relationship. I consciously displayed a **generative attitude** by non-judgemental behaviour. Another interesting shift was when three managers individually shared their concerns with me regarding the perceived disrespectful behaviour of the General Manager at the hotel. He seemingly manifested disrespect by not acknowledging managers' cultural and family values. I interpreted their openness at this early stage of programme implementation as evidence that I was successful in facilitating an atmosphere of trust. It also indicated to me their potential uneasiness to share these aspects with other colleagues at that stage.

**Commitment statements** made by some managers were at times tentative confirmed by the use of words such as *"I will try"* and *"hoping to..."*. Within the context of change it might have been indicative of a paradoxical internal state of wishing to succeed, while fear of failure might still have been lurking in the shadow of past change experiences. However, as time passed the managers became more **emotionally engaged** and several mentioned their fear of self-disclosure. **Communication flow amongst the managers improved** and a more relaxed atmosphere was noted as demonstrated by humour and increased team engagement.

A **shift in candour** was eminent when team members did not only reflect on one another's strengths during the appreciative dialogue facilitated during session 3 (Figure 5.1), but also identified each others' personal areas of growth. This indicated that the team experienced the learning environment as **psychologically safe** enough to engage with each other on a deep level. It also evoked a sense **realness** and gratitude. Managers thanked each other for the



feedback and were clearly touched. They additionally acknowledged the personal growth areas that were indicated by other managers.

A **cultural perception shift** was voiced when feedback was given to the only non-Swazi member of the team in terms of his *“polite”* demeanour and how it created space for conversation versus the old perception that *“...when you deal with white people you don’t say much...”*. This reiterated my previous awareness that a cultural sensitive M&A programme approach would be crucial to facilitate sustained performance – and also that language creates reality. Rostron (2006:57) argues that in a context in which racial differences are often the driving force of daily life, it is inevitable that colour still plays a major role in public discourse and personal sense of identity. She reiterates the value of being highly cultural sensitive as a coach and suggests that coaches “learn to navigate these delicate waters with flexibility and skill”. It is further aligned to the Appreciative Inquiry assumption stating that differences should be respected (Preskill & Coghlan, 2003:10).

Positive **relational awareness shifts** were noted as reflected by the following quotations: *“We all think differently ... we have different ideas”*, *“we (found) a common ground ... what we have acquired should be maintained ... open-mindedness, respect for the ideas of others and transparency”*. A shift towards increased team cohesiveness was noted. A manager became ill and therefore could not attend the last day of the orientation programme. Some managers mourned his absence. During contact with people in authoritative positions such as the Chief Executive Officer and the Director of Organisational Development, the team was noticeably more reserved, indicating a need to grow in confidence.

The findings of the valuation of the first stage of the M&A orientation intervention are described next.

#### **a.iv) Valuation of the M&A orientation intervention**

**Valuation of the M&A orientation** reflects my quest to generate trustworthy feedback from managers regarding the worth of the M&A orientation intervention. The research methods that guided programme valuation are described in detail in Chapter 2 (2.4.2.4 a.i – a.iii). The data collection process consisted of a **formative valuation** component in the form of generating naïve sketches of managers’ experiences of the programme on a daily basis. A **focus group** was conducted with managers as a **summative valuation** strategy. **Field notes** further served as a data triangulation measure.

The central story line or essence of the M&A orientation intervention emerged from data as a view that it was a **“worthwhile” process that generated an affirmative mental health enhancing atmosphere of hope and confidence on a wholistic level**. The central story line gave evidence that the programme supported the programme **destiny**: the generation of transformed and integrated managers that are able to sustain performance related to mental health facilitation (Figure 5.1). The following quotation serves as justification of how the programme influenced team members in terms of their **relationship with the self, others** and the **environment**, thus on a wholistic level: *“The induction programme assisted us to understand how special we are (relationship with the self) in the (company). The feedback was positive about all the work we have done in the three months probation (sense of security in the working environment). Words of encouragement are appreciated (relationship with others). The (company) must thank the Lord, in order to fulfil the mission of the (company) or to be a star above (spiritual dimension)”*.

The perceived worth of the programme will hence be described based on the following three major themes that indicate how it generated an appreciative mental health enhancing atmosphere of hope and confidence on a wholistic level:

- A programme approach reflecting a *“family building process”*
- The emergence of hope and confidence in the relationship with the self, others and the environment
- Wishes to sustain the future worth of the programme

By reflecting these themes the voices of the managers who were engaged in the M&A orientation programme, are honoured.

- **A programme approach reflecting a *“family building process”***

The following account aims to indicate how the **programme approach** – described as a **“family building process”** – seemingly instilled organisational and personal security, while simultaneously igniting an increased sense of belonging, thus supporting a context for mental health facilitation. The programme approach incorporates the **programme structure, process and methodology**, as well as the **facilitation style** employed by the team coaches. It appeared as if the **programme** succeeded in addressing knowledge, skills and attitudinal gaps in a *“purposefully”* structured and outcome-based way, evidenced by the achievement of *“certain results”*. Several managers described how **principles of adult learning** were realised during programme implementation. It was mentioned that the approach did not imply *“...a lot of information on a blackboard in front of the class and end of story ... it is gathered yourself”*. Additionally: *“We had somehow to search and struggle to get the answers*

*ourselves...". Managers mentioned that they appreciated "clarification on things" and that they experienced the process as "more involved as in your normal historic going on a course where a few days after you don't remember anything".*

The **facilitation process** seemingly resulted in increased team cohesiveness essential for company culture integration: *"Firstly, it was getting the team together to help each other. To open up, to bond, to share their differences and the end result was to finish the chores quicker and ... (we) managed to polish up differences" and "it benefits us all in this move into a new company".* Data reflect that the need *"to create an atmosphere whereby an outsider will see that (we) are one"* was achieved. The concept of 'cohesiveness' is also reflected in the section on the emergence of hope and confidence in the relationship with others.

In line with adult learning principles the **facilitation style** of the team coaches were perceived as creating a context of personal security as evidenced by the following quotations: *"You helped us by explaining to us what were the research and your duties in this course, because for us we didn't know what to expect...".* Managers mentioned that we displayed a **generative attitude** and **emotional intelligence**: *"Being cool and trying very hard to make us understand why you do some things"; "you do not get irritated very easily or maybe you have control over your feelings which taught us something" and "being considerate and gentle".* We were thanked by a few managers for the *"briefing that took place in Swaziland before the induction",* confirming the **value of prolonged engagement** in the context of a cross-cultural M&A. The importance of **role modelling** faith in the team was recognised by managers as a valuable competency displayed in my role as a team coach during programme implementation: *"(What we appreciate about you is) your dedication and commitment to the group and your belief in the programme ... your strong belief in our team".* Most managers agree that the programme was *"worth the time spent on it".*

The **programme approach** was on the whole experienced as collaborative. Managers affirmed the use of a **methodology** that generated active participation, the acquisition of life skills, knowledge and a sense of appreciation conducive for company culture integration. The **life skills coaching sessions** – such as the tower building activity and the fire drill - were highlighted for achieving the outcome of getting more connected with others. A manager reflected: *"I enjoyed all the interactive games ... every interaction taught you (more) about other."* Another mentioned that the *"informal sessions ... kept one as being part of the programme. One could not wander off as in many other styles of training. The programme assisted me to participate...".* It seemed as if some managers grasped the deep learning related to participation in life skill coaching activities and perceived it as: *"putting plans into action and participating in the team, firstly as an individual and secondly as a team member".*

The **programme approach** achieved the outcome of stimulating a future vision (*“hope for the future no matter what happens”*) and provided a *“sense of direction”* rooted mainly in the facilitation of the **discovery** and **dream phases** of the Appreciative Inquiry process. Meeting the Chief Executive Officer and other members of top management as part of ‘selling the acquirer through storytelling’ was described as a collective highlight. The story of how the Chief Executive Officer started the business in the hotel industry filled managers with inspiration, affirmed their value and fostered a sense of belonging. One of the managers echoed the words of the Chief Executive Officer, stating *“nothing in life that is impossible, everything is possible”*. Another reflected: *“It had been encouraging to listen to the Chief Executive Officer that one can achieve anything in life, nothing is impossible if you plan correctly, stay focused and empower yourself without being pushed.”* This part of the programme was described by managers as one of *“the best”*, based on the perception that it conveyed an appreciative message that the work done by the team *“for the past three months was work well done”*. It was described as a *“nurturing”, “motivating”* and *“inspiring”* encounter.

The sharing of M&A change stories by the two line managers who were involved in a previous M&A process in the company, apparently *“put a stamp on the director’s comments”*. The inspirational value of this activity is clearly portrayed in the following citations: *“we got inspired that these people live on what they say”* and *“you so desire at least one person that will see your progression...”* and *“the explanation we got from (the two line managers) helped me to gain confidence in the (company).”*

*“Hope for the future”* was additionally strengthened through the session that focused on the development of a new team identity. Team members presented their new name, *“Lukwethi”* (brightest star), as well as the newly designed team vision, mission and performance indicators that should be delivered on the merged company to the Chief Executive Officer and one of the Directors. This presentation unfolded as reinforcing the managers’ sense of belonging reflected by the following quotations: *“Their smiling showed acceptance of the name, vision and mission of the team”*; *“The induction programme assisted us to understand how special we are in the (this) group. The feedback was positive about all the work we have done in the three months probation. Words of encouragement are appreciated. The ... group must thank the Lord, in order to fulfil the mission of (the group) or to be a star above”*. A new sense of direction that clearly suggested possibilities to sustain the change was portrayed by: *“It has brought a new sense of direction...”* and *“everything discussed was an eye-opener for me and a lot of work done in the ... programme will assist me to be able to communicate with my colleagues and manage them”*.

- **The emergence of hope and confidence in the relationship with the self, others and the environment**

**The emergence of hope and confidence in the relationship with the self, others and the environment** was revealed as the second major theme. Data indicated that managers' engagement in **appreciative communication practices**, such as **sharing mission critical information** and participation in **generative conversations** within the triangular coaching relationship, resulted in an experience of increased personal and organisation security. The increased sense of personal and organisational security manifested as **hope and confidence in managers' relationship with the self, others and the environment**. Expressions of goodwill from the Chief Executive Officer and the Directors were described by managers as "nurturing". A manager verbalised: "...we have been working without policies, no structure, but the way they (Chief Executive Officer and Directors) have appreciation for us ... a good motivation to me...". The award giving session was also mentioned as "memorable" and a "motivating factor".

Managers were of the opinion that the **acquisition of company-specific knowledge** boosted their self-confidence. They perceived themselves as growing in their ability to be resourceful in future interactions with reporting colleagues, instilling the hope that they would be able to influence their work environment in a positive way. The following accounts provide justification for this intertwined theme: "Now we are better equipped to say this is ... how the company operates ... so you are talking on experience"; "We came here not knowing ... now we might be in a state to tell"; "I have realised that the company has one vision" and "the investment of knowledge done with the team should result in performance excellence".

Session three entailed an Appreciative Inquiry regarding **managers' strengths as leaders** in this context. This session was pointed out by most managers as a coaching method that increased their self-awareness through assessing their leadership competence, as well as establishing positive relationships with other managers. A manager reflected on his experience of the activity as follows: "I know myself and others better than before...". Another added: "...it opens eyes on things that you were not aware about ourselves and you were not aware that people know you so well" and "(it) have helped to know one another very well on a deeper level". A manager mentioned that it assisted them to "look at each and every individual to explore them in a new way".

The value of self-disclosure related to this activity emerged as: "to talk about ourselves ... was interesting for me ... I didn't know that people could say so much about you ... I was amazed". It appeared as if this activity motivated team cohesiveness as evidenced by higher levels of

team engagement throughout the rest of the five days. I observed in my field notes that the level of team participation increased during and after this session. This greater sense of unity – not only linked to team cohesiveness, but also feeling more united with the rest of the company - was confirmed by: *“We are the star above the rest and I wish and pray that we fight to be the best team among the ... group, of course given the opportunity that to deal and be exposed to other (company) groups, I am sure, I will be an asset while learning from them.”* A manager observed that the programme aimed to *“get the team together ... to bond ... to polish up their differences”*. A clear shift was noted in their understanding of the value of teamwork: *“...we need to work as a unity...”*.

My engagement in programme implementation made it clear that even though some managers worked together from the inception of the hotel, **cohesive team identity was lacking**: *“First we came here, we did not know each other...”* and *“...teamwork helps us because we pick up that we need to work as a unit...”*. **Cultivation of a cohesive team identity** resulted in an **increased sense of personal and organisational security** reflected by the following verbatim quotations: *“I think we are a better team, strengthened”* based on *“the experiences that we have shared, the assurance, the team building that has actually taken place with us. We feel that if there is another take over we won't be bothered”* based on the *“amount of knowledge, skills we have acquired”*.

**Hope and confidence in the relationship with the environment** were furthermore reflected in experiences that the programme generated increased adaptation and a willingness to change. A manager reflected that it was a *“good programme; it benefits us all in this move into a new company”*. Another pointed out: *“If change happens ... you will be able to ... in a very early stage of a problem resulting from change ... to identify and then take corrective actions...”* and *“...try to change as much as we can”*. Managers were able to identify the pragmatic underpinnings of the programme and how it could be used in their real-life working context. The following feedback was provided based on the **design phase** of the Appreciative Inquiry process: *“What was done today had meaning in our daily activities”* and *“(the best part of today was) when we presented our vision and mission statements to the Chief Executive Officer and see he was happy with it...”*. It was mentioned that the programme *“accelerated the mode of understanding and commitment on the job”*. It further increased awareness in terms of goal achievement: *“...set my goals first and focus. Then I can be able to plan the game and win”* and *“we have a goal to achieve that will result in success”*. Additionally, a commitment emerged from a majority of the managers to cascade the learning to other colleagues at the hotel and to keep the learning opportunity alive as evidenced by: *“...everything that we discussed opened my mind ... and will make me to able to communicate and deal with my colleagues freely and better”*; *“teach others, lead them and get the best out*

of them” and “we are getting motivated and we must flow motivation to the line staff”. Seeing the bigger picture of organisational life and an intention to be engaged in planned, thoughtful and responsible activities are reflected by the following comments: “I intend to use (what I have learned) in my department as well as in the company itself...”; “growth in my workplace ... can be beneficial to social life as well”; “developing my department to be aware of things happening around them not only in their department but other departments too”.

The team agreed that there were “no meaningless activities” in the programme and they stated that the “programme was appreciated”, but it appeared as if the **self-disclosure component posed a personal challenge** to most. One manager reported that the least enjoyable aspect of the daily activities was related to self-disclosure. He stated: “I’m not used to share a lot of personal things with other people or being discussed by others, but I feel that the exercises are worthwhile”. Even though it was not explicitly voiced by others during programme implementation and evaluation activities, it was evidenced by the field notes and group process and dynamics. It was also evidenced by the fact that only two of the team members were willing to hand in their reflective diaries at the end of the orientation programme. Another challenge area mentioned by some team members were the way that questions were structured. They mentioned that they sometimes “could not understand some of the questions asked during activities” and requested the team coaches “to keep it short and simple”.

- **Wishes to sustain the future worth of the programme**

Similar to the recommendations made by team members as part of the situational analysis conducted as the first stage of the research process (4.3.4), managers **wished for enabling strategies to sustain the M&A change** and for **an affirmative mental health enhancing environment**. The need for **enabling strategies** emerged as a need to gain knowledge and life skills related to perceived personal, relational and environmental challenges. Managers identified a need for training in terms of goal achievement and dealing with Human Immune Deficiency Virus (HIV) and Acquired Immune Deficiency Syndrome (AIDS) in the workplace, communication skills, assertiveness, stress management, time management and leadership skills. A need to transfer the learning to other staff categories and to **sustain M&A change** was evidenced by a request “to carry on with this programme even with the junior staff” and the expressed hope that “the very same induction programme must not come to an end”.

A few managers mentioned a need for the inclusion of after hour recreational activities as part of the programme as well to participate in site visits at other hotels, inferring to an internal

need to belong and to know more, thus a **learning environment that reflects care and concern**. This need can be summarised by the following quotations: *“...what we did on Wednesday night when everybody went out to the soccer; maybe look at an almost after hours induction programme as well ... just to have a bit of a break as well but still keep it in the team. But I don’t want to fall back on your historic team building ... climb up a mountain or whatever...”*. Several managers requested that future team coaching meetings should not be continued at the hotel, but instead take place at a different venue related to anticipated environmental challenge. This is supported by: *“You would not have seen me (if the programme took place at the hotel); I would already have been in my office...”* and *“...I have kept my cell phone on and I was contacted once or twice, but I promise you it is 100% or 99% less than what I would have been contacted (if the programme took place at the hotel)”*. One manager said that the duration *“of the course was too long”*.

Data confirmed that the **M&A orientation intervention** succeeded in co-constructing an **affirmative mental health enhancing environment** that supported hope and confidence in managers’ relationship with the self, others and the environment. Data confirmed that **managers’ programme expectations were met** in terms of their desire for *“knowledge about the company and to know what they expect”, “improved team work, unity and team relationships”, “personal development and awareness”, “opportunity to meet other role players in the company”* and to *“see the vision and connect it to the team”*. **Movement from a position of past pain to an experience of initial healing** was reflected by the following comments: *“...after a bulldozer has moved through a forest there is direction”* and *“we are willingness to move forward”* based on the experience that the *“bad stuff belongs to the past”*. Data indicated that the managers made positive shifts in terms of moving from a group of people working together, to a team realising their common purpose. The programme additionally assisted managers to be purposefully positive.

It can be concluded that the M&A orientation intervention succeeded in cultivating an **affirmative mental health enhancing environment** conducive for the ultimate realisation of programme destiny (Figure 5.1).

#### **b) Stage two: M&A implementation intervention**

The point of departure of this stage of the programme was to sustain the **affirmative mental health enhancing environment** that transpired as a result of the Lukwethi teams’ participation in the first stage of the programme. The **outcome** of the M&A intervention was aligned to the ultimate **programme destiny**, namely the generation of transformed, integrated managers living the core company ideology in sustaining performance from a position of



internalised mental health behaviour (Figure 5.1). Additionally, the M&A coaching intervention aspired **to unleash the generative potential inherent to the paradoxical nature of the cross-cultural M&A**. Continuous integration formed an integral part of this phase, embedded in the reality that the actual implementation phase bears the biggest risk (Visagie, 2007:20).

The M&A implementation intervention focused predominantly on realising the **fourth stage of Appreciative Inquiry**, namely **destiny**, meaning that it centred on the implementation and continuous evaluation of the best integration practices, thus sustaining positive change (Figure 5.2). It additionally involved the actualising of phases two and three of the **M&A team coaching process**, namely **committing to action** and **sustaining performance**. Realisation of these programme aspects will be described throughout the description of how the M&A implementation intervention was lived in this context.

The tale of the M&A implementation intervention through continued team coaching will hence be revealed with reference to:

- Acknowledging the context
- Living the M&A implementation intervention
- Unfolding team dynamics and process

**b.i) Acknowledging the context**



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The description of the context is embedded within a description of how I merged the substantive context with the methodological context (Johns, 2001:31). The **substantive context** refers to the organisational context in which the phenomenon occurred. The **methodological context** refers to how I actualised the **cycle of programme refinement, implementation and valuation** in my quest to generate a worthy Appreciative M&A team coaching programme.

The continued M&A team coaching meetings were held at the hotel in Swaziland. The decision to continue with **team coaching at the hotel**, instead of using another venue as suggested by some managers, was based on company procedure related to economical, operational and logistical issues. It would have had major cost implications to conduct monthly team coaching at other venues. It would also mean that the entire management team would be away from the hotel, creating potential operational issues. The logistics also posed a challenge in terms of arranging, amongst others, transport, replacement staff and venues.

The M&A implementation intervention commenced in May 2003 and ended in May 2006, with a **summative programme valuation** in the form of **qualitative interviews** with the

management team to explore whether the programme had met the overall programme destiny (Figure 5.1). My relationship with the team as a team coach did, however, not end there. I maintained this position for another year as part of a strategy to sustain the change.

A **vast amount of data** was gathered during the three years of engagement in this setting. Data reduction emerged as a relevant research challenge. I found it especially hard to decide which data to exclude from the data analysis process. This initial uncertainty regarding what was important and what not, was inherently linked to data attachment from my side. Miles and Huberman (1994:10) advise selecting data that will reveal “local groundedness” so that the reader will have a strong handle on what “real life” was for the managers. My sole purpose was to reflect a legitimate account of how the Appreciative M&A team coaching programme was lived during the three years with reference to the **coaching mandate**, the **topic choices**, **methods** used, **outcomes** achieved and the **unfolding team dynamics and process**. **Self-reflexivity** emerged as a valuable data reduction tool during the final data analysis process.

The **data sources** incorporated in the multi-voiced account included a **document analysis** of **24 team coaching reports**, including **reflective letters**, **descriptive feedback sheets**, data elicited from **coaching tools and techniques**, **field notes** and **secondary reports**. The process concluded with conducting **individual qualitative interviews** as mentioned above. Tesch’s descriptive method of open coding was used for data analysis (Creswell, 1994:154–155). An independent co-coder assisted me with data analysis and we reached consensus on the themes depicted in the array of data sources. See Chapter two (2.4.2.4.b.i – b.vi) for a detailed description of the data collection strategy.

The coaching stakeholders remained the same. During the course of the three years, however, **team membership changed** due to the dynamic nature of the organisational context. Team numbers differentiated between **seven to eleven managers** at different times. A **restructuring process** within a year of the acquisition was partly responsible for the changes in team membership. Only **two white South African managers** were engaged in the team coaching process at different points in time. **Three female managers** joined the management team during the course of the three years. Only **three of the original seven managers** participated in the team for the duration of the programme, one being a female. The management team was led by **four different General Managers** during the three years. Three of them were white South African citizens recruited by the company.

An article in the Company’s newsletter (2003:2) reflected an **apparent lack of management enrolment** in the overall coaching process in the company as a whole: “*After a lot of reflection we’ve decided to focus once more on the issue of team coaching ... we believe that several ...*

*managers are still not fully committed to the process... . The problem is that despite our best efforts to evolve the process, including constant reassurance that we are open to change, we are still experiencing ongoing absenteeism. At this stage team coaching is voluntary; we haven't cracked down on absenteeism yet...".*

#### **b.ii) Living the M&A implementation intervention**

The discussion that follows locates the process of my endeavour, as the primary programme agent and team coach, to marry the coaching mandates of the stakeholders in the triangular coaching relationship with each other. The story of how the “marriage” was fulfilled is discussed below with reference to an overview of the **company coaching mandate, topic choices** addressed and the unfolding **team coaching structure and process**, including **additional tools** and **techniques** that emerged as part of the “construction kit”.

- **Company coaching mandate**

A yearly **coaching mandate** was set by the company’s Chief Executive Officer. This was communicated to the team coaches at coaching meetings and the yearly strategic session. The coaching mandate focused predominantly on the following two key strategic drivers, namely **increased revenue** and **customer service excellence**. It was linked to the “enhancement of efficiency and performance, predominantly through employee relationship management and quality assurance” (Company newsletter, 2003:2). A need was expressed by the company stakeholders for team coaching in all business units to be aligned to the company’s strategic plan, as well as to the core company ideology. The mandate focused on “*coaching gaps*” based on ongoing competency and gap analysis. Managers’ ability to set and execute goals was described by the company stakeholders at the onset of this stage of programme implementation as “*still a problem at this time*”.

- **Topic choices**

**Topic choices** that directed coaching meetings were aligned to the coaching mandates of the stakeholders that formed part of the triangular coaching relationship. These mandates were at times opposing one another. The findings of the situational analysis and the valuation of the orientation intervention point to the **mandate of the management team**. In essence they called for an M&A team coaching process that would generate an **affirmative mental health enhancing environment** reflected by **appreciative communication** and **principle-centred leadership practices**, **the generation of an affirmative learning environment** and **enabling strategies to fulfil a need for knowledge and skills transfer** to sustain change.

As **team coaches** our **mandate** was simply to be successful in this endeavour and to facilitate sustained performance on different levels, including our own.

**Topic choices** addressed during the **first year** were situated within **team-oriented life skills** and **business coaching practices** guided by an Appreciative M&A Inquiry approach. This was largely in line with the coaching mandate of generating employee relationship management, as well as responding to the wishes made by managers during the first stage of programme implementation. We further complemented the **Appreciative M&A Inquiry approach** with **solution-resolution methods** where needed, based on the assumption that answers reside in individual managers' skills repertoire. This entailed addressing business and personal issues divulged during the coaching process, rephrasing it, eliciting alternative possibilities, developing goals and then crafting an action plan to meet these goals (Zeus & Skiffington, 2000:10–11). According to my view an Appreciative Inquiry approach does not exclude the recognition and facilitation of perceived challenge areas in an organisational setting. The focus is to depart from a strength-based stance, thus applying areas of personal, collective and organisational strengths to sustain change.

**Topic choices** that were addressed in the **first year** included amongst others **conflict management in the workplace, leadership, trust, emotional intelligence, continuous improvement and growth** focusing on the South African Excellence Model (van den Heever, 2009:1) and **coaching for performance**. This was in line with the translation of “enhancement of efficiency and performance” in the company newsletter as creating a “sense of purpose and direction through setting goals, reiterating the company’s vision, mission, core values, strategies and priorities; generating employee relationship management and moving back towards the basics ... of communication, time management, conflict management and performance management” (Company newsletter, 2003:2).”

The **topics** addressed during the **second year** focused on **anchoring the company’s management philosophy** as well as **coaching the team to manage operational issues**. It included coaching to implement the company’s management philosophy, reflections on team strengths and perceived challenge areas or weaknesses, customer care and customer satisfaction, practical ways of living out the company values and team feedback practices in the form of a 360 degree competency assessment. A clear shift was made in terms of moving to a **business team coaching model**, also to a more **problem-resolution focus**.

The coaching focus moved to **execution intelligence** and **setting well formed outcomes** in the **third year** with the intent to ignite managers’ potential for sustaining change. **Topics** included tactics to overcome managerial challenges in the context, unpacking team identity to

strengthen team unity and ongoing assessment of team performance based on guest questionnaire feedback amongst others.

**Marrying the coaching mandates** in the triangular coaching relationship aspired to generate an **affirmative mental health enhancing environment**, by transforming the perceived climate of personal and organisational insecurity to a climate of belonging, to create a performance orientated attitude and to ensure cascading of acquired learning to lower levels situated within the overall programme outcome, thus “strengthening the affirmative capability of the whole system” (Cooperrider & Whitney, 2005:16).

- **Team coaching structure and process**

**Each coaching meeting** followed a specific **coaching cycle** entrenched in the M&A team coaching process with reference to sustaining **commitment to action**. The coaching cycle implied a continuous feedback loop with relevant functions and roles for the coach at each step (Zeus & Skiffington, 2002:26). It also implied the use of specific **tools** and **techniques** that formed part of the **M&A team coaching “construction kit”** to achieve the desired outcomes (5.2.5.1.c.i – ii).

The realisation of the following steps pertaining to the **coaching cycle** will hence be described:

1. Re-connecting and accountability checking
2. Negotiating and executing the agenda
3. Reflection, evaluation and feedback
4. Goals meeting
5. Follow-up and reporting

### **Step 1: Re-connecting and accountability checking**

Each meeting commenced with the coaching tasks of **re-establishing rapport** and **building trust**. These coaching tasks were realised through the generation of feedback about the team’s progress with reference to **re-connecting** and **accountability checking activities** described in 5.2.5.1.c.ii. We aimed to affirm the team on the one hand, and on the other we strove to foster a sense of accountability. Zeus and Skiffington (2002:79) support the idea that coaching meetings should commence with an evaluation of the progress that the client had made in the interim.

**Re-connecting** simply means that we honoured the coaching partnership by displaying authentic interest in the lives of the managers belonging to this team, thus conducting an

inquiry into their current realities. It focused on affirming individual and collective successes that had transpired since the previous coaching meeting. We hoped to display the message: “you are noted.” **Accountability checking** refers to the facilitation of feedback that aims at soliciting a sense of accountability and autonomy for change and performance in the context. It served the purpose of assessing individual and collective progress in meeting performance outcomes since the previous team coaching meeting. In essence, it entailed a first step in obtaining evidence of behavioural and attitudinal changes, as well as evidence of goal execution.

**Accountability checking** was mainly guided by **reflective practices** based on asking **generative questions** regarding individual and team performance as well as the facilitation of **team dialogue**. We provided the team with a **reflective letter** that departed from an appreciative stance after each coaching meeting. The focus of attention of the letter was to reflect upon individual and collective shifts we noted during the course of the coaching meeting, to create awareness of deep learning and behavioural changes, as well as to reflect on team dynamics. It also entailed a request for feedback regarding the execution of personal and collective goals (Appendix 7.2).

A last aspect of this step involved **information sharing** with the team to enhance their sense of connectedness to the larger context of the company, such as feedback from coaching facilitators meetings, discussions with the company key stakeholders or company-specific strategic interventions. This phase of the coaching process was at times concluded with the team singing the company song as a way of fostering culture integration.

## **Step 2: Negotiating and executing the agenda**

We provided the team with an electronic copy of the team coaching agenda prior to meetings based on the assumption that coaching should be a collaborative process. We additionally conducted an inquiry regarding what managers would like to focus on during the meeting (Zeus & Skiffington, 2002:78). The agenda was informed by the requirements and wishes of each stakeholder category as mentioned earlier. Elledge and Phillips (1994:37) state that, even though the team should plan its own end result, the facilitator should be able to influence the process and the agenda to guarantee achievement of the end result.

**Executing the agenda** entailed meeting the agenda outcomes, setting clear goals and devising action plans to ensure relevant execution of goals. We actively used different coaching tools and techniques from the **M&A team coaching “construction kit”**. A valuable tool for establishing goals and mapping an action plan was the **GROW (Goal, Reality,**

**Options, Wrap-up) model** (Alexander & Renshaw, 2005:227–267). The **future-focused business coaching dashboard** was another useful tool in this regard (Price, 2002:33). As a wholistic future-focused tool, the business coaching dashboard incorporates personal values, company values, the vision and ethos of the company, the hierarchy of relationships, the company's strategic focus area, each line manager's strategic focus area, including their key performance areas and personal or team competencies. It also unpacks the relational requirements between the individual or team and the coach by asking: "*What would inspire me in this coaching relationship?*" and "*What would be exit lights from the relationship?*" It ends with a lucid action plan with clear timelines.

At times **executing the agenda** involved **reviewing aspects** that either facilitated or hindered change, such as reviewing habitual individual and collective behavioural patterns (Zeus & Skiffington, 2002:78). Examples of these patterns included habitual late coming, a lack of execution of actions and blaming behaviour amongst others. Mentoring activities were additionally used to transmit knowledge, information and critical skills (Zeus & Skiffington, 2002:21/22). Alignment of personal and company goals throughout this phase was essential to generate involvement, learning and action. Entrenched in the coaching agenda was the facilitation of **appreciation activities** such as the yearly celebration activity that symbolised the worth of the M&A team coaching process. Managers made **awards** for each other to celebrate each person's contribution to the team as a collective entity. The awards were then awarded to them during the yearly team coaching breakfast.

This step in the coaching cycle ended with a continuous learning opportunity in the form of a **homework assignment**. At times it involved engagement in relevant reading material, achieving goals set during the coaching meeting or cascading of learning to other colleagues in the hotel. Tracy (2007:43) emphasises the importance of "continuous action". He describes it as follows: "Perhaps the most outwardly identifiable quality of a successful person is that he or she is in continuous motion ... trying new things."

### **Step 3: Reflection, evaluation and feedback**

**Reflection, evaluation and feedback** refer to the termination leg of each coaching meeting. Reflective practices involved ongoing reflection on learning and renewed insight that transpired during the coaching process. Managers' basic assumptions and frames of reference were often challenged during the course of the coaching process resulting in new awareness on personal, collective and organisational levels. It also implied that individual and collective progress was continuously reviewed, evaluated and realigned as part of the coaching process. Managers were thus requested to appraise individual and team progress.

They were further requested to generate feedback regarding different aspects of the coaching meeting, such as personal experiences, perceptions of whether the collaborative agenda was met or not, and sharing their hopes and dreams for future team coaching meetings.

#### **Step 4: Goals meeting**

Next, a **goals meeting** was facilitated by the General Manager. Each manager had to establish five operational goals at the end of each coaching meeting that were aligned with the hotel strategic plan and key business drivers. This approach to goal setting was prescribed by the company stakeholders as a way of sustaining performance in the context. The goals meeting commenced with feedback regarding managers' achievement of goals set in the previous session, followed by feedback regarding the new set of goals.

#### **Step 5: Follow-up and reporting**

**Follow-up** and **reporting** highlight the importance of ongoing interaction with the management team and the company stakeholders. **Follow-up** comprised of aspects such as **continued dialogue** through the use of a reflective letter that was sent to the team after each coaching meeting. It further included telephonic or electronic contact with the team from one coaching meeting until the other. A **coaching logging report** was compiled after each meeting for the company stakeholders, outlining the results of the coaching meeting specifically, as well as the overall progress in terms of the team coaching process (Appendix 7.5). The report addressed how we prepared ourselves for the meeting as team coaches, the purpose of the meeting, how we facilitated the coaching cycle, evidence of shifts pertaining to individual managers and the team as a whole, as well as personal reflections. **Reports** were **member checked** by managers prior to its distribution to the company stakeholders as a measure to ensure trustworthiness (Krefting, 1991:219).

The **termination phase** in the coaching process, namely **sustaining performance**, focused on an in-depth summative valuation of managers' experiences of the M&A team coaching programme, with specific reference to how it facilitated their mental health in the context of company culture integration. Essentially, the third phase involved the **termination** of the coaching relationship and **follow-up plans** to sustain the destiny that was ultimately co-constructed.

#### **b.iii) Unfolding team dynamics and processes**

The unfolding team dynamics and processes gave an account of an organisational context constantly in flux. The context portrayed different shades of organisational and personal



security. Realities regarding organisational and personal security were socially constructed in alignment with external and internal events. These realities transpired as a **cycle of engagement** in the coaching process. The cycle commenced with a **honeymoon phase**, reflected by **initial hope and confidence** in the new marriage between the acquirer as evidenced by managers' intent for healthy engagement. It was followed by a **period of disillusionment** in the marriage, reflected by individual and collective behaviour patterns exhibiting the "three R's", namely "*resentment, resistance and revenge*". In this phase healthy engagement was compromised by survival strategies such as blaming, "*paralysis*" and inconsistent performance patterns. **Organisational and personal insecurity** were rife. A **reconstruction phase** followed that indicated an increased ability to adapt to the change, resulting in mental health facilitation. During this phase the generative potential inherent to the paradoxical nature of the M&A process seemingly generated sustained performance. However, the team coaching process emerged as the bearer of "*light*" in all three these phases - or as managers said: "*When I thought it is dark ... after coaching it is lighter*"; "*I was down and out, now it is summer time ... I am a happy man*"; "... *go from uncertainty to hope*" and "*coaching makes things bright to me*".

Managers entered the second stage of programme implementation with **hope and confidence** for a successful marriage. It was evidenced by managers' initial engagement in the team coaching process, specifically reflected by the attendance patterns during the first year (May 2003 – April 2004). Four of the eight coaching meetings were fully attended. Not even disease or personal responsibilities could seemingly interfere with the initial relationship between the team and us. A manager commented on his presence at team coaching when he was physically unwell by saying, "*This (coaching) has made me happy and I wanted to come today, even when I am sick...*". Another one added: "... *it goes to our blood ... I didn't want to miss it...*". One manager attended a night vigil after the death of his sister, yet he attended the coaching meeting the next morning.

The reasons given for the non-attendance of one or two members during the rest of the coaching meetings included "*annual leave*" or personal reasons. Coaching in the company was compulsory aligned to the core company ideology. Company policy required that managers had to schedule their annual leave and days off around the coaching dates. The first year's team coaching attendance pattern thus predominantly indicated compliance with this rule.

Team membership was relatively stable during the first year with only two managers joining the team. External environmental demands seemingly triggered the second cycle of engagement, namely **disillusionment**. This happened soon after the commencement of the

coaching process. External environmental demands emerged as a **troubling relational pattern with the different General Managers** appointed at the hotel during the course of the three years, a **restructuring process, operational demands, personal issues, “cultural” realities, internal changes to the team structure** and **“hijacking forces from head office”**.

In order to survive these realities managers resorted to the “*three R’s*”, namely “*resentment, resistance and revenge*”. These **patterns of protest** filtered through to the coaching meetings. It included declining attendance figures in the second year with as many as four members absent from coaching without informing us prior to these meetings. Only one of the nine meetings was fully attended. Passive resistance was displayed during coaching meetings as evidenced by habitual late coming for meetings, a lack of active participation in the coaching process at times and inconsistent execution of coaching goals. The external demands increased the risk to managers’ mental health related to the dynamic interaction between the internal and external environments. Within an Appreciative M&A Inquiry framework, however, it also created opportunities for growth and development or, as a manager commented: “*We all need rain ... to correct difficulties*”.

The interaction between the external and internal environments will now be described with reference to: (1) a **troubling relational pattern with the General Manager**, (2) **restructuring, internal team changes, operational demands and personal realities**, (3) **“cultural” realities**, (4) **“hijacking forces from head office”** and (5) **personal and collective transformation**.

- **Troubling relational pattern with the General Manager**

The **disharmony between the team and their immediate line manager**, namely the General Manager, had a powerful influence on the well-being of the newlywed couple (acquirer and the hotel). Most managers felt that their “*efforts (were) not appreciated*” in their relationship with the first two General Managers. The situation was described by one as: “*A virus had infiltrated the team*”. An experience of **being voiceless** in these relationships was also revealed as reflected by the following verbatim quotations: “*There are times you are feeling like saying something, but maybe he (General Manager) won’t like that...*” and “*I don’t feel free to speak before the General Manager*”. It seemed as if managers needed someone to be their voice in an environment where they feared to express themselves authentically. A specific manager in the team fulfilled this role, possibly to re-construct a sense of harmony and organisational security. He reflected on this reality as follows: “*I sit with the boss to calm him down. I am a release valve*”. Team coaching became another forum to voice concerns as evidenced by the following accounts: “*This is the only time we can sit around and address*

*issues without the General Manager...”; “there are times you are feeling like saying something but maybe he (the General Manager) won’t like that ... sometimes you would rather address it privately but the rest of the group don’t get benefits” and “I don’t feel free to speak before (the General Manager) ... this is the time to discuss issues”.*

Personally I also became the “voice” of the team or specific managers at times. I will share one account with you. Prior to the third session I raised my concerns regarding the relational challenges that transpired between the General Manager and managers to the General Manager’s individual business coach. I requested her to address the situation in a sensitive fashion, honouring the confidential nature of the information disclosed. She discussed the situation with the General Manager, who then confronted the team. The third coaching meeting commenced in a strained atmosphere. Managers displayed passive aggressive behaviour as evidenced by unresponsiveness at the start of the coaching meeting. I intuitively realised that the managers’ behaviour had something to do with this event. I fell back on my previous knowledge system and decided to manage the situation by facilitating a truth circle or *indaba*.

I requested managers to form a circle, seated on the floor, representing the traditional way of sharing moral tales around the magic of the African fire (Broodryk, 2006:66). Next, managers were invited to share the truths of their hearts without fear of judgment. The spirit of sharing was supported by rules of engagement such as portraying a non-judgmental attitude, listening silently and respectfully. A “**stick of truth**” was passed from one person to the other as a way of eliciting as many voices as possible. While someone held the stick, he or she could express his or her truths without being interrupted or questioned. The outcome was a **negotiated process regarding confidentiality**. Managers requested that member checking should still be adhered to, but that team discussions should not be seen as confidential and an “*atmosphere of secrecy*” should not be encouraged. Constructive action should rather be taken to address issues that may threaten team well-being and team performance.

The **truth circle activity** was described as “*uncomfortable*” by some managers because it “*became very personal*”, yet it was a foundational step in building trusting inter-team relationships, including the relationship with us. A manager reflected that it “*strengthen ties of understanding*”. Another added that “*the whole thing had a positive effect on everybody ... you could see many questions were answered and everybody was satisfied...*”. A third manager commented: “*We became different people ... things were cleared out ... to hear team coaches coming to open plane to ... apologise ... strengthen ties of understanding...*”. After this session managers expressed their underlying fears and concerns more authentically. One manager said: “*... it will never be the same*”.

The teams' overall positive response to this activity might be understood within the African philosophy of **forgiveness** that stipulates "everyone makes mistakes, but mistakes could be valuable life lessons, and it is only through erring that most people learn" (Broodryk, 2006:84). At a later stage during the coaching process (re-constructing phase) a manager made it clear that it is of the utmost importance to recognise positive behavioural change instead of focusing on the negative. He urged the team to "say thank you to the GM...".

How could the teams' need to form alliances with us or with a specific manager at the time - be understood? A natural form of sharing in the African philosophy is to contribute to solving of a dilemma a person finds himself in (Broodryk, 2006:58). Manager' behaviour should also be situated within another important African value, namely respect. **Respect** from an African stance stipulates rules that govern authoritarian relationships. The following account elicits how traditional practices of respect silenced voices in this context: "*On the question of how are we coping, I can say difficulty. There is a lot of pressure coming through. We have the (General Manager) ... now that we have seen him without X, trying to fill the gap ... in our tradition it is very difficult to go and approach somebody of a status as (the General Manager), you need to get a buffer...*". Annie, the co-coach at that time, supported this reality by stating that this manager "*gave an example of a child asking his mom to tell his father whatever is his needs ... believe you and me, it happens in the African culture*". A manager disclosed the following supporting statement: "*Our culture never allowed us to be open or talk to elders and reply back. You just listen even though you felt it is not right you cannot argue*". Broodryk (2006:64) agrees with this argument, reflecting on one of the conventions of respect in African society which exacts **respect be shown at all times to authority**, irrespective of whether or not one agrees with the view of the authority figure.

A **pattern of silent protest** was further evidenced in the way that the team ultimately got rid of the second General Manager. An anonymous letter was sent to the Chief Executive Officer listing his perceived misconduct. He was moved to another hotel as a result of this behaviour. The culture of "revenge" expressed by a specific manager in the context, might have given rise to this event. Thereafter, two managers who formed part of the team were appointed as Assistant General Managers, one a Swazi male and the other a white South African male.

The **tension between the cultural way of being and meeting the demands of the business culture** resulted in the hijacking of the pre-determined coaching agenda at times. Our ability to manage time efficiently during these meetings emerged as a facilitation challenge related to the tension between marrying the coaching agendas of the different stakeholders in the triangular coaching relationship.

- **Restructuring, internal team changes, operational demands and personal realities**

The **second year** of team coaching (May 2004 – April 2005) commenced within an external environment of **renewed organisational and personal insecurity** related to yet another restructuring process. One manager was demoted related to apparent performance inadequacies, and another one dismissed after a disciplinary hearing. Managers refer to these organisational realities as follows: *“still swinging career wise ... I don’t know where I am”* and *“I’m hanging on ... won’t fall off ... literally hanging in there”*. Another one expressed a sense of hopelessness: *“I’ve been in this industry for too long”*. *“Team coaching came at a time when the hotel staff was going through a phase of internal problems and there seemed to be no way out for me at the time either than to just resign and go in peace,”* another reflected.

The **second year** of the team coaching process was characterised by **constant internal changes** in the team composition. The **restructuring process** had an immediate impact on the structure of the team with the loss of the two managers mentioned above. Five new team members were also included in the team coaching process by the second General Manager to *“give them the tools of being managers”*. They fulfilled assistant management positions. The internal team coach (Jeanette) joined the coaching process in February 2005. The **internal team changes** posed a challenge in terms of building a cohesive team, because the team dynamics changed with the addition or attrition of each and every manager. This resulted in a strengthened team reality regarding *“different levels of understanding”* that sometimes emerged as a time robber during meetings. The General Manager removed the assistant managers from team coaching within six months due to operational demands. According to them he did not discuss this decision with them; they just noticed on the roster that they had not been scheduled to attend coaching. This behaviour of the General Manager triggered a **sense of disrespect**.

During the **third year** a new manager joined the coaching process. He was the second white South African that obtained a line management position in the hotel. He was perceived as *“excellent”* in terms of operations, but he actively portrayed the role of confronter during coaching meetings, challenging the status quo. Team dynamics changed again, with the *“three R’s”* clearly depicted in overt conflict that became a new visible pattern in the team. Meetings were sometimes tension-laden and we had to be creative in terms of the tools and techniques we used to stay as neutral as possible, while striving to facilitate engagement and growth. Interestingly enough, the execution patterns portrayed improvement soon after he joined the coaching process as evidenced by, amongst others, managers’ participation in the reflective letter writing.

We did not always succeed in being “**neutral**”, **and** often experienced frustration with the inconsistent pattern of execution, the pace of the team at stages displaying disharmony between our energy levels and the energy levels of the team, patterns of protest (“*three R’s*”) and communication breakdown at times. It seemed as if some managers found it difficult to complete the forms. This could be related to the fact that the coaching programme was not conducted in their first language, but in English.

**Operational demands** such as “*attending to a Royal wedding*” or “*attending to the needs of conference delegates*” disrupted the coaching process on numerous occasions. Managers at times moved in and out of meetings explaining that it is in the best interest of the operations, yet sabotaging the coaching process.

**Personal realities** that kept managers away from coaching meetings included “*seeing the chief about land*”, “*death in the family*”, sick leave or attending to family matters. At times managers were physically present, but they appeared absent and distracted. A manager explained their behaviour as follows: “*We enjoy being back and are committed to the team and the process. The responses and interaction (that you observed) were not due to trust or any negative emotions towards the process, but largely due to work and personal issues that were creating a lot of pressure and distracted some members*”. Personal factors that created “*negative emotions*” were portrayed as financial difficulties (“*rise in school fees*”) and living in an environment where death and dying seemed to be a daily reality to many. The 12<sup>th</sup> coaching logging report reflects on this situation as follows: “*...the coaches welcomed the team. Very few members, our team struggles with punctuality. This time the excuse was the hotel is busy. Their faces told a story of being down in the dumps, they are not coping they say*”.

Another personal reality emerged as an initial **lack of confidence** displayed by some managers to take part in different coaching activities, such as discussions, responding to questions, participating in reflective practices, assessment activities and creative activities. This pattern of low engagement could be linked to some managers’ fear to disclose in a group setting, possibly embedded in impaired self-confidence. I noticed that some managers would rather talk to me during tea breaks or after the meetings. The following verbatim quotations provide evidence of the difficulty experienced by some managers to disclose on a personal level. A manager verbalised: “*... uncomfortable to talk about personal stuff...*”. Another one said: “*I am not a very open person ... won’t volunteer information*”. However, it appeared as if there was consensus among managers that it was “*definitely necessary to iron out problems for future working relationships...*”.

**Other external environmental factors that resulted in increased strain of** some managers were *“airfare problems resulting in a decline in the international market”*, thus impacting on the hotel’s occupancy levels and revenue, as well as getting supplies across the border from time to time. The *“sick people”* was mentioned as a relevant external demand. A manager’s words clearly compel the *“need to have a work plan...”* to deal with the situation. He asked: *“How do we assist the sick people in this company? ... As a company we need to start assisting. Some people could have been saved.”*

The above accounts clearly indicate how external environmental demands influenced managers’ internal environment and well-being, ultimately reflected in their level of engagement in team coaching.

- **“Cultural” realities**

Coaching was scheduled on Saturdays during the first two years. The reason was mainly to accommodate our travelling needs as team coaches. The **unstable attendance pattern** during the second year of team coaching, as well as a request from the team to re-schedule coaching to a weekday, because they *“have to attend funerals or cultural functions on Saturdays”*, convinced us of the potential value to move coaching to Fridays. Personally, I believe that this was a significant turning point in the progression of the team to the reconstructing phase. Managers gave us feedback prior to this decision that we *“do not understand”* their culture. After this session a manager said: *“We have an open agenda. A clean agenda for you. We are starting afresh today, not disregarding the past”*.

Personally I believe that our decision to accommodate managers’ cultural realities did not only show a shift in terms of our cultural sensitivity as coaches, but opened the door for renewed trust between the team and us. Prior to this event it was their view that we had *“lacking understanding”* about these personal realities.

- **“Hijacking forces from head office”**

The **“we versus them” culture** was a reality throughout the team coaching process, raising the question of whether the coaching intervention succeeded in authentic company culture integration. It was mentioned that *“hijacking forces from head office”* posed a threat to the team coaching process. These forces included *“internal politics”*. A specific assessment, pertaining to the South African Excellence Model, orchestrated by the Director of Organisational Development was described as *“very confusing and de-motivating”*. This

resulted in a process of splitting in the triangular coaching relations, evidenced by managers' perception that coaching meetings conducted by us were somehow more fulfilling.

Managers initially **resisted setting five operational goals** as prescribed by the company's management philosophy. It was affirmed by the following verbatim quotation: *"People see goals as extra work ... fear of failure..."*. Managers' predominant feeling was that they were not consistently affirmed in the external company environment. Their initial inability to confront conflict seemingly complicated this situation. A combination of this described external reality and the internal vulnerability of some managers apparently created a *"paralysis situation ... too many people are scared to face the ongoing problems that we have ... they are looking for recognition ... but other departments are letting them down ... business culture too scared to confront... want people to be happy at the cost of the business"*. A manager who resigned stated that he *"was treated like a dog"*, amongst others, because his *"bonus"* was not paid out. In contrast, however, another manager stated *"we are getting information from head office that this is supposed to happen and we get recognition from them you know, they are congratulating us when we are doing well and we would like to keep it there..."*. Another *"hijacking force"* pertained to conducting coaching meetings at the hotel.

- **Personal and collective transformation**

**Reconstruction** was, however, evidenced from the third year onwards. The team displayed significant personal and collective transformation, internally as well as externally, such as **from being voiceless to reclaiming voice**, from **low levels of engagement to enhanced levels of engagement**, from **working as a group to building a cohesive team** and **from a dark, shady past to a hopeful future**. A manager confirmed these observations regarding a process of transformation as follows: *"...there is quite an incredible shift that has happened..."*. The emerging patterns of transformation are justified by verbatim excerpts from reflective letters received, signed by the *"Lukwethi"* team, with the exception of two letters received from individual managers.

A **shift from being voiceless to reclaiming voice is confirmed in the following excerpt** from a reflective letter: *"The coaching clinics are such a blessing to the O group and surely I wonder if (the Director of Organisational Development) realize that she put in place a jewel for the group. The coaching approach you as team coaches unleashes to us, makes us feel as if we are decision makers and it is an eye opener where one realizes if something is wrong with the ship or the sailor and you feel empowered to speak out so that the ship does not sink in your presence. In the pas we did not dare question the general managers even if one could see there was something which needed to be corrected for the smooth running of the place*



*because they had super-powers. Team coaching ... has equipped us to be part of the place and responsible for the day-to-day happenings in the establishment and any unbecoming behavior is stopped there and there without fear of victimization as we feel as partners with the owner of the group. The message passed on to us from team coaching simply says do not let the place fall before your own eyes as you are now given a full mandate to correct what needs to be corrected”.*

A second reflective letter confirmed this behavioural shift: *“We have realized that the way we are conducting ourselves this point in time is indicating an incredible growth in both the team and in our daily operation, this includes confrontation in matters pertaining business. It is quite evident that if we employ this kind of move, we can only take our business from good to great... . The fact that we are now able to convene a meeting with the general manager and take sound decisions is great achievement, also the general staff meeting we have always wanted to have with the general manager is now happening”.*

Transformation **from low levels of engagement to enhanced levels of engagement** were visible in relation to managers’ **execution of the coaching agenda** during the coaching meeting, and their **execution of coaching related goals beyond team coaching meetings**. It also pertained to a move from a described **“culture of blame”** to a **culture of accountability**, as well as **from being a group working together to a cohesive team**.

The next excerpt from a team reflective letter points to **internal and external transformation processes** that indicated **sustained performance** in relation to the execution of coaching related goals: *“On scoring ourselves on execution, we have taken the initiative to execute. We do walk about every Wednesday and before the next walk about, we meet as a team and look what has been done and what has not been done and why it has not been done, then we help each other where possible. We realized that we lack focus on the discipline of execution and that’s why we fall short and we have gaps between what we do and what we deliver”.*

Another reflective letter portrayed a **story of being “empowered” through engagement in the Appreciative M&A team coaching programme** as a whole, resulting in higher levels of execution of goals: *“As a team we are not scared of any situation now, everything that happens, to us it’s a challenge ... We are more focused meaning we create order without demanding it, we have found our path. We agree that we now speak a more solution focused language, we are aware of our financial dashboard and control aspects, we execute, we support each other, we take full responsibility of our actions, we have adapt well to changes. A lot has contributed to that, to mention a few, will be you Retha, Jeanette and M by giving us guidance and making us believe we can do it as long as it is in our power. You made us*

*translate the organization's larger "line-of-sight" strategic goals or critical priorities into our actual day-to-day work, together with the team's goals. You have empowered us".*

Transformation from a culture of blame to higher levels of accountability is portrayed in the following excerpt: *"We hold ourselves accountable, we are done with blame games, we are responsible and we want our STAFF to learn from that. To us now team coaching has turn to be where we "gloat" of our achievements. Some of us didn't even know we have such potential in us. We are motivated and eager for new ways to go forward and be the best team and uplift standards and do things the O Way because it is really happening..."*

The following excerpt of a reflective letter affirms transformation **from working as a group to building a cohesive team**: *"There is just too much spirit of winning in the team like you can not believe it and that alone is very encouraging mostly to me as an individual. Everybody wants to achieve and the fact that there is one of our own in the top positions (referring to the appointment of one of the Swazi managers as an assistant-manager) makes the difference as we do not want him to be seen as failures because his failure will be our failure if you understand what I mean".* Another reflective letter portrayed the development of team "synergy" as follows: *"we get along very well in our unit ... we help each other, we communicate when things are not right and work as a team"*.

An individual reflective letter received portrayed the **transformation from a dark, shady past to a future of hope** as a result of the coaching process as follows: *"Your traveling for hours to and from the hotel is not in vain. What I realize is that team coaching is producing managers or future general managers; we are being equipped to face the World's challenges in a smart way where our decisions and input will be respected. Maybe you are not realizing what you are doing now but in the near future you will reap the fruits if (the company) will continue with this programme. Sometimes you may think the message is not being passed on but believe me that it is sinking as words are spiritual they have ways of resurfacing in power. The way you are teaching is not for head knowledge but sinks in the inner man if I may put it in a deep meaning"*.

Another letter put it this way: *"In a sense we are an older, wiser team that lost a few members of the team but we did not lose the lessons we learnt with and from them. We are looking forward to put all the bad memories behind us, remember the good things and build up a positive working environment to ensure that the future is bright for everyone"*.

## 5.2.6 Programme Destiny

The programme **destiny** represented the **outcome** of the Appreciative M&A team coaching programme, namely the generation of **transformed, integrated managers**, able to **sustain performance related to mental health facilitation** within a context of company culture integration. It additionally incorporated the realisation of the outcome of the last stage of the Appreciative M&A Inquiry cycle, namely **destiny** (Figure 5.1). **Destiny** is symbolised by a circular shape portraying a blend of purple, red and orange. The purple unites the strength of the human spirit in sustaining learning and performance, and the wisdom of striving towards optimum mental health. The red indicates the intention of motivating stakeholders to embrace the generative potential inherent in the paradoxical nature of the cross-cultural M&A. The orange symbolises hope and the celebration of lifelong learning.

The programme aimed at creating an **affirmative mental health enhancing environment** that would enable managers to be **adequately integrated** within the company culture, living the core company ideology in alignment with their own value systems. In essence, an integration of managers' internal and external environments, evidenced by emotional and behavioural responses that signified personal, relational and environmental transformation. The **heart of company culture integration**, therefore, entailed **personal, relational and environmental transformation** of managers from the initial deficit position - where the inner organisational dialogue echoed the dark, problem-saturated side of the cross-cultural M&A - to a position of increased "*hope and promise*" (4.2.4).

The **unique contribution** of the research was envisioned as adding a **worthy Appreciative M&A team coaching programme**, embedded in a specific theoretical framework, to the area of business coaching in particular. A **crucial question** that I feel obliged to answer - and which is related to the worth of the programme at this point in time - is: "**Did the M&A team coaching process achieve its destiny?**" I shall answer this question based on the integrated findings of the summative qualitative individual interviews conducted with nine of the managers of the "*Lukwethi*" team, field notes and the transcriber's reflections. The question posed to managers was: "How did the team coaching process assist you in your relationship with yourself, others and the environment?" I deliberately included the manager who had been excluded from team coaching early in the second stage of programme implementation related to the restructuring process. I made this choice to honour his contribution to the team coaching process, even if it was for a limited period.

What follows is a **summary** of managers' experiences related to the **transformational influence of the programme** with reference to the **relationship with the self, others and**

**the environment.** I shall conclude with the essence of the story, presenting a final interpretation of the findings of the second phase of the research process.

All managers gave vivid accounts of how the programme influenced them in terms of their **relationship with the self.** The progression of sharing in all interviews indicated that **personal transformation** might have been the most influential of all the changes that occurred related to programme participation, as evidenced by the following opening responses starting with the self: *“I will first start with personally”, “...it assisted me a lot in discovering who I was...”, “it was of quite benefit to me..” and “I would actually start by saying way back in 2003 when we started the team coaching process I firstly didn’t know and didn’t understand where we were going. I knew were we came from...”.* The credibility of this argument is further supported by the weight of reflections about personal transformation in comparison to the reflections about relational and environmental transformation.

**Personal transformation** was described on different levels, indicating progressive personal growth and development in areas such as **self-awareness, identity formation, confidence and accountability.** A manager exclaimed: *“Look at me now ... It grown me ... taught me to stand up and face situations...”.* Another manager arrived at a similar conclusion: *“I want to be honest with myself that I was down and out but now I am back in action and the zeal is just incredible, there is no way again that I can go to that phase as it was terrible. I believe in myself as the process has made me to feel that way and in a long lasting way. Life was dark and gloom and the only hope was that Jesus loves...”.* The following verbatim responses further support this theme: *“Personally I’ve been helped, because of late I can talk now”, “I gained more faith in myself”, “I don’t have any fear anymore in my job”, “It was really a great help mainly in self introspection” and “I understand that team coaching is there to bring out the real me”.* Personal transformation in terms of identity formation, of creating hope for a positive future, is reflected in the following narration: *“My dress code has changed and I am an executive person earning respect from my colleagues and the community at large. I do believe that someday I will be the kings’ advisor and give him hope when he is feeling blue as I have been given hope by the process”.*

A last, unique level of justification involves sharing the comments written by the **transcriber** as she concluded each interview: *“I found it amazing to hear how this participant has benefited from team coaching not only in the work place, but also outside it. He spoke so clearly about gaining faith in himself and confidence that would become a part of who he is and how he performs his duties. He spoke of growth and taking responsibility ... I believe this participant will grow to exceed his own known capabilities...”.*

**Relational transformation** was a natural consequence of **personal transformation**. This pertains not only to the strengthening of vertical and horizontal working relationships, but also to social relationships outside the workplace. A clear shift from being less relational oriented to being more relational oriented emerged in relation to programme participation: *“I had been so forlorn in a way that my good reputable relationship with my staff (as I fondly call them) was just negative and they were also wondering to what had befallen their hero and role model and motivator. Look at me now I am back in track and the broken hearted people are able to come for comfort and advise in life's encounters they face. The relationship is excellent and one is like a father and playing that fatherly role as team coaching has groomed us to groom others and be in their shoes”*. More related quotes that were put forward, are: *“As a team we were able to accept each other...”, “team coaching made us one...”, “now I can talk to everyone...”, “we relate better now”* and *“we are talking the same language more...”*. One manager linked the relational transformation emerging from team coaching to emotional intelligence as follows: *“I was able to relate with my kids a lot better, be more lenient with my wife and especially when it comes to emotional intelligence”*. The **transcriber** arrived at a similar conclusion: *“(the participant) place emphasis on the fact that team coaching aided her in opening up towards other people and the fact that it contributed in forming unity amongst the team .... She also found that team coaching had a positive effect on her relationship with her son in the way they could now communicate and have mutual understanding for each other”*.

**Environmental transformation**, reflected in the accounts that follow, clearly indicate how managers gained knowledge, skills and competencies to become more efficient in their job. It also gives evidence of as to how the coaching process ignited ownership and sustained performance in this context. It was mentioned that the team coaching process enabled managers *“to have direction”, “to organise your life and to have your dreams at your finger tips”, “to take responsibility to solve problems”* and *“I am now able to delegate properly”*. A manager offered the following words in terms of the emergence of environmental ownership: *“The process brought me to a new realisation that I own this place and a true share holder. If a glass falls and breaks I say in my heart there goes my money as I know that I have bought that glass by the virtue that I work here and am part of management and this is a wonderful encounter when one faces reality with his environment. The sense of ownership is very deep and I now know that this is my business and I can make it succeed or fail”*.

The **transformation to enhanced ownership** was also confirmed by: *“before we just didn't care...”* and *“the team coaches taught me how to be a hotelier ... I have to be friendly with everyone”*. Team coaching apparently facilitated the emergence of a deeper connection and love for the environment and is evidenced by: *“The hotel had become ruins to me and it was*

*like I was coming to a cemetery: There was no life on this roof which I have treasured in the past with gladness in my heart. During off days I never thought I would be able to come back and face the environment which was bringing pain in my life, it was just ugly. But now I have fallen in LOVE with my hotel once again...”.*

The interaction between managers’ internal and external environments was evidenced by the following two remarks:” *I think before ... I did like it but I didn’t have that courage or power, but now I am confident and love what I am doing”* and “*... in an environment people got different ideas and different minds, so the coaches made me see I mustn’t be stingy, I must come out and talk to others and then in that place the atmosphere changes. You smell flowers. You smell gold. You feel good”*. One manager referred to the transformation in the environment “*from the cultural gloom into the business class of understanding business”*, while another manager noted: “*In our culture we were so humble ... we didn’t get things right ... now we are bold.”*

The **transcriber’s reflection** on the **environmental transformation** that she depicted in one of the interviews, was: “*This participant had so much to say! He spoke freely and openly about his lack of commitment to team coaching initially and he seems extremely proud of the way he has changed and evolved into a better manager during the course of the team coaching. He focused mainly on his own lack of delegating before team coaching and how it has helped him to now become a more reliable participant in the coaching and also a better manager to his staff by way of involving them in decisions”*.

**How did the team coaching process facilitate personal, relational and environmental transformation as described above?** Managers linked it predominantly to our **facilitation style**, our **way of being** and the **coaching tools and techniques** used. For me personally, it was a humbling, yet affirming experience to engage in the programme valuation process. Our **facilitation style** was perceived as affirming as evidenced by the following account: “*There is something that touches me most about our team coaches, which is when you ask us questions and we do not answer correctly; you always shape our answers to the right answer. There has never been an instance when you say ‘No! that is not the answer’, but you somehow find a way to use the same words we use in answering to shape them to the right answer. The kind of spirit you people have then helps us in dealing with others, we learn to respect them and make them feel that they are of great value. I am patient with others as I know that we are not the same level in thinking and doing things”*.

The following verbatim quotes additionally support the perception that the **facilitation style** created a **psychologically safe space** that allowed wholistic transformation to occur: “*the*

team coaches..., they don't look down upon you no matter how low the position is, it just that 'Oh, he is performing, he is something for the company', and that is where team coaching has worked for us in terms of recognition" and "... team coaches just break down the information ... then also you are free to talk to them – the openness, because they open their hearts to what you want to say. They listen to your problems, and then you start discussing them and even the colleagues themselves get to know what problems you are going through so that they are awakened to help you ... the team coaches bring us together, we brainstorm our problems and we get solutions...".

It was mentioned that the coaches supported change by **anchoring relevant information and feedback**: "... to deal with change I've noticed it's got something to do with information. A person cannot just change without you giving them the right information ... we've started to know the figures to know when we hit targets...". A manager affirmed our **mentoring role** as follows: "There are a lot of things that the team coaches taught me. You know to have dignity to yourself, that's the major thing, because if I don't have dignity for myself I won't give dignity to the next person".

Affirmation of realisation of the **performance influencing role** transpired as: "The team coaches assisted me because I know if there is anything bad, once I hand it over to them, they will know where I am standing, they will now me inside ... and once I speak out ... they make me become clear on something that was not clear when I was alone." The coaches were additionally displayed as "passionate" and respecting managers' freedom of choice: "... they do not just come in and say 'this must be', the whole scenario is aligned until they reach a situation when they actually feel that you've got fears, they first check base with you ... the provision of a variety of options ... on how to deal with the situation...".

Trust was displayed in our **coaching competence**: "team coaches have got hands-on grip on to each and every individual ... they know every single unit's individual problem. They mix with the staff ... I would say they are highly accepted ... highly valued...". We were also perceived as perseverant: "I am actually wondering how you people persevered to survive under this thick cloud. You have actually been seeing the cloud in the faces of the people ... I am sure in the four hours of your driving you are asking each other questions like: 'How do we bridge this gap?'".

The **transcriber** noted: "... an important point was the recognition these employees clearly thrived on. I realised myself during this interview just how motivating it is in a work environment when you get noticed for hard work. Team coaching has benefited these participants by teaching them the importance of good communication and the power of

words...” and “I think that team coaching has had a tremendous effect in establishing values amongst the team members, such as understanding, respect, positiveness...”.

**Sustainability** was reflected by a perception that “team coaching is like ... one of those tool boxes that you can’t leave behind as you go along with your life, because it’s got everything, the spanners ... the screwdrivers ... when you have problems then you just open the box”. It was also mentioned that team coaching “became part of my life. It is the way I see things, the way I dream about life...” and “you take it and implement it in your life”. The ongoing monthly team coaching sessions were linked to sustainability: “...(without ongoing coaching) we wouldn’t have made this shift. The monthly coaching was to ensure that there are a number of assignments on your part to take the team from where it was into what it is today” and “...all the managers are attending team coaching and the spirit is filtering to the support layers...”.

### 5.3 CONCLUSIONS

My engagement with the data created in me an awareness of these managers’ quest to be validated, heard and respected in the described context of a cross-cultural M&A. **Paradoxical M&A realities** prevailed. Managers wanted to feel part of a family, to move beyond the problem-saturated nature of the change process and to generate hope and possibilities in the midst of competing realities. Programme success depended on collaboration and inclusiveness, thus creating a community of care in order to sustain positive change. Ludema (in Cooperrider, et al. 2001:281) confirms this reality: “social knowledge and organisational destiny are tightly intertwined...”.

It can be concluded that the Appreciative M&A team coaching programmes’ **return on investment** was embedded in its gift to facilitate managers’ mental health, commencing with **personal transformation** that filtered through to **positive relational** and **environmental changes**. The transformation process reflected a cyclic process of engagement, commencing with **emotional distress** in the pre-M&A stage as well as in the early stages of the M&A (first three months), followed by a **honeymoon phase** after the M&A orientation intervention. **Disillusionment** was encountered one year into the M&A, and there was a move towards **reconstruction** from year three onwards.

Data reflected that the programme succeeded in the **generation of an affirmative mental health enhancing environment** needed to sustain performance throughout this process. Managers’ programme experiences additionally affirmed the realisation of **increased personal and organisational security** related to the demonstration of **appreciative communication practices** in their relationship with one another and us. The **knowledge and**



**skills transfer** integral to the ongoing team coaching process optimised managers' confidence in terms of their relationship with the self, others and the environment.

**Company culture integration** was evident in managers' behaviour that indicated **increased commitment** to act in accordance with the company's core ideology. The "we-they" discourse was however still lurking in the background, raising questions regarding authentic company culture integration.

Chapter six will provide an account of the summative programme valuation conducted by the expert stakeholder group.



# Chapter 6

## EXPERT AND AUTO-ETHNOGRAPHIC PROGRAMME VALUATION AND REFINEMENT

*“We can never fully understand the purpose of human life.*

*A construction worker can have no idea of the final form or general design of the large structure that he builds.*

*But, he should know that he is doing something which is beautiful, clever, and necessary for him and the whole world. And that is faith.”*

(Leo Tolstoy *in* Havenga Coetzer, 2004:3)

### 6.1 INTRODUCTION

I write this Chapter with immense gratitude for the expertise and time invested by the eight expert stakeholders who participated in the summative valuation of the programme. Their invitation was guided by the objectives of the third phase of the research to **establish programme worth from the perspective of an expert stakeholder group** and to **generate recommendations for programme refinement** essential to improve future programme applicability in a similar environment. The valuation process was aligned to **Appreciative Inquiry** as a key theoretical paradigm that guided the research. The **auto-ethnographic research strategy** was realised through the incorporation of my **personal reflections** regarding programme worth and recommendations for programme refinement. My intent is to answer the following two research questions in this Chapter, namely **how worthy is the programme** and, secondly, **what recommendations can be proposed to enhance future applicability of the programme?**

### 6.2 DESCRIPTION OF THE EXPERT STAKEHOLDER GROUP

The programme was evaluated by an **expert stakeholder group** consisting of **eight experts** in the field of programme development, Appreciative Inquiry, team coaching and organisational change. The expert group was **purposively chosen** based on their expert knowledge and experience in diverse, yet complementary, fields. The number of experts who had been chosen, was guided by Lynn (*in* Frölich, 2001:172) who states that, though the number of judges who might be used for evaluation purposes have not yet been established, it is unlikely to exceed ten. The author maintains that a minimum of five experts would provide a sufficient level for the likelihood of agreement (Lynn *in* Frölich, 2001:172). I consulted an **external expert stakeholder group** that consisted of my two research supervisors, an

industrial psychologist and academic partner who is nationally recognised for his expertise in the field of Appreciative Inquiry, and a clinical psychologist who directs organisational change and additionally holds a qualification as an International Neuro-Linguistic Programme trainer. The **internal expert stakeholder group** consisted of the two team coaches who co-facilitated the programme for 18 months each and two company stakeholders, namely the Director of Organisational Development and Director of Business Solutions. Both company stakeholders had additionally qualified as Master Executive Coaches. Both team coaches were advanced professional business and life coaches with extensive experience in programme development.

### **6.3 PROGRAMME VALUATION AND REFINEMENT GUIDED BY APPRECIATIVE INQUIRY**

During the design and planning stage I generated **eight criteria of worthiness** that served as a frame of reference to make conclusions regarding the worth of the programme as a first step in the process of expert valuation. These criteria are reflected in Chapter two (2.4.3). The criteria were not given to the expert group for valuation purposes, because of the decision to follow an inductive valuation process. Data were therefore inductively collected by means of a naïve sketch that was distributed to the expert stakeholder group (Appendix 8.1), complemented by an auto-ethnographic naïve sketch (Appendix 8.2), incorporating my own reflections of programme worth and wishes to improve the programme's future applicability as a legitimate data source. Appreciative Inquiry guided the questions asked (Preskill & Catsambas, 2006:35).

The first two questions aimed to establish the worth of the programme, namely:

- What do you think contributes to the worth of the programme?
- What do you most value about the programme?

The last question aimed to generate recommendations to improve the future applicability of the programme, namely:

- If you had wishes to enhance the worth of the programme, what would they be?

Data analysis was guided by Tesch's descriptive method of open coding (Creswell, 1994:154–155). I ultimately used the criteria of worthiness as a frame of reference to make conclusions regarding the worth of the programme based on the data obtained from the naïve sketches. A literature control was conducted to re-contextualise new theory in existing literature sources (Morse & Field, 1996:107).

### 6.3.1 How Worthy Is This Programme?

The next section provides the expert stakeholders' reflections regarding programme worth, complemented by auto-ethnographic data regarding programme worth.

#### 6.3.1.1 Expert stakeholder reflections

Stakeholders were of the opinion that the programmes' **greatest worth** was integral to the **participatory, generative and appreciative nature** thereof. The **programme design and methodology**, guided by an **integrated Appreciative M&A team coaching approach**, resulted in meaningful programme and organisational processes as well as outcomes. The **programme design** refers to the overall blueprint or structure of the programme. It incorporates the assumptions and methodology employed to achieve the programme destiny, namely the generation of **transformed, integrated managers** who were able to **sustain performance related to mental health facilitation** within a **context of company culture integration** (5.2.6). The employment of an **Appreciative M&A team coaching process** resulted in shared personal, collective and organisational learning and the generation of cohesive relationships in the context. A stakeholder wrote: *"The programme worked because it was designed in such a way that the participants experienced it as being affirmative of their strengths, and generative: the positive energy that was generated by the programme broadened their thinking which in turn generated new learning. Moreover, the programme was successful in the sense that it has built...the participants' sense of being a strong, cohesive team able to sustain their performance. The candidate/coach managed to create and maintain an appreciative environment "conducive to mental health facilitation", because appreciative communication and sense-making were skilfully encouraged"*.

The following comments additionally reinforce stakeholders' perceptions regarding the **worth of the programme design and methodology** in the context of a cross-cultural M&A: *"Utilising Appreciative inquiry possibly counteracted the 'problem-saturated nature of the M&A process' as AI is based on a positive philosophy that guides organizational transformation"; "Setting the stages with a five day orientation programme. This part of the programme gave valuable opportunity for clarifying and enforcing the company's strategic intent, value propositions, approach to goals setting as well as introducing the concept of coaching" and "The coaching cycle provided a holistic business and relational focus to the programme. It ensured accountability within a caring relationship. It was future focused with an attempt to center on both task and relationship."*

The two company stakeholders added: *“We value the use of the Appreciative language and what Works – well designed...good framework.”* I put it this way: *“The orientation programme created learning space for personal, collective and organizational transformation needed for company culture integration. Managers had a positive experience of programme participation because they felt valued and respected as human beings. The Appreciative Inquiry approach fostered the “Freedom to be Positive”, as stated by Cooperrider (in Whitney & Trosten-Bloom, 2003:xi). During the M&A orientation intervention managers described a heightened sense of belonging – firstly in their relationship with each other as a management team, secondly in their relationship with important company stakeholders and lastly in their relationship with the team coaches. They gained important knowledge regarding the company’s strategic intent, ways of working and organizational culture. Personally, I witnessed a growing sense of motivation and commitment to each other as a team and the company as a whole.”*

Adhering to *“basic principles of adult education”* and the *“wholistic stance”* of the programme further confirmed its worth. Data from stakeholders indicated that adherence to **principles of adult learning** resulted in a mutual collaborative *“outcomes driven approach”*, while the *“wholistic stance”* reflected its theoretical underpinnings related to Appreciative Inquiry (Whitney & Trosten-Bloom, 2003:51–79) and the Theory for Health Promotion in Nursing (University of Johannesburg, 2009:1–10). A stakeholder explained: *“The adult learning approach ensured that the recipients of the programme were treated as self-directed learners with their own agendas and learning space. This ensured buy-in in the programme as well as respectful rapport.”* Another stakeholder added: *“The times and outcomes were perceived as personally relevant to the members of the group”* and *“the group members could contribute definitely to the outcome of the contact sessions and the overall process of coaching,”* as they *“co-regulated the material, content and tempo of the process”*. This stakeholder reflected that managers had the *“expectation of a positive outcome”*, while adding *“at least positive to them, if not both to them and the organization”*. He concluded that programme participation resulted in *“a sense of efficacy”* as managers *“realized during the event of the contact sessions that they were able to do”*.

The value of using a **wholistic approach**, thus facilitating managers’ mental health, was reiterated by the following stakeholder comment: *“Approaching the programme from a wholistic stance gives testimony to the importance placed on the well-rounded, fully potentialized human being. We do not have bodies, minds and spirits, we are these things.”* Another internal stakeholder commented: *“We took managers as a whole and we looked at them as a whole. We did not see a kitchen manager or a front office manager. We saw whole people.”* The **wholistic approach** was seen as contributing to the generation of an affirmative mental health enhancing environment: *“The programme really facilitated the mental health of*

*the managers. It showed in their willingness to attend coaching, their appreciation of coaching and their willingness to align themselves with the vision, mission and goals of the company.”*

The programme was perceived as **doing justice to different stakeholders’ views and ideas** (Wadsworth, 1997:31). In an Appreciative team coaching context, managers were free to share their stories, contributing to integration in the merged context. A stakeholder reported: *“The programme met the constructionist principle in that the managers were able to tell their own stories and were able to discover who they are and where they fit in the new company. During the first stage of programme implementation they flourished and were positive about the stakes they had in the company. They were able to dream about their own prosperity in the company...there was FLOW. They could see themselves being able to manage the challenges in their respective managerial positions...”*

Another stakeholder pointed out that the *“inclusion of multiple stakeholders made certain that voices were not marginalized”*. From a personal stance, I noted: *“I think the visible inclusion of the Chief Executive Officer in the orientation programme worked. The team blossomed when they felt accepted in this relationship. The input of the Director of Organisational Development and other company stakeholders in the initial refinement activities of the M&A orientation intervention and later the M&A implementation intervention assisted me in my role as the primary programme agent. I entered the business context with limited experience and using a diversity of perspectives assisted me to expand my understanding about organizational issues.”*

The input offered by my supervisors – as another level of doing justice to different stakeholders’ views – filled me with appreciation. I wrote: *“My research supervisors visited the research context once a year, spending a weekend at the hotel in Swaziland. That worked for me. I felt that they were truly interested in this endeavour and that they cared about the people involved in the process, including the co-coach and myself. They provided valuable feedback as external witnesses to the programme process from an appreciative stance.”*

I agree that the **programme design** and the use of **multiple methods** worked. I reflected on this aspect as follows: *“The structure and flow of the programme worked. The first stage of programme implementation was guided by the findings of the situational analysis. I conducted the situational analysis in cooperation with one of the co-coaches to establish programme applicability and to elicit the interests of the management stakeholder group specifically. It assisted us (team coaches) to gain a better understanding of the organisational context. The second stage – the M&A team coaching intervention through team coaching – was yet again guided by the knowledge and insights that we obtained during the first stage of programme*

*implementation. The coaching cycle, methods and tools worked. It created shared personal, collective and organisational learning, ultimately resulting in the achievement of the programme destiny, namely transformed and integrated managers that were able to sustain performance related to mental health facilitation.”*

The programme's worth was integral to the **facilitation process** orchestrated by the team coaches who worked in a partnership to facilitate the programme destiny. A stakeholder put it as follows: *“The coaches passed the numerous tests of their authenticity (including how they managed the process when questions were asked, differences of opinion, scepticism, not for being convinced, dealing with contrary reference experiences, etcetera) as being genuinely interested and the outcome is, as stated, of mutual benefit.”* He added: *“The expertise and inputs of the coaches were seen as useful and desirable to the outcomes of the team and to them as people.”* He commended the team coaches for their ability to create a context of psychological safety eliciting personal, collective and organisational transformation: *“The perceived safety - based on the reading of authenticity - was high and allowed members to feel safe with each other as well since the managing of the process was in the hands of authentic and capable coaches”* and *“The information inputs allowed for comfortable personal absorption, processing, validation and application.”* I wrote: *“I think our ability to tolerate ambiguity as team coaches was probably one of our best attributes in this setting. Also, to stay true to our core values and to genuinely care about the managers until the end.”*

The following comments emphasise the importance of our decision as team coaches to expand our coaching capacity through **engagement in accredited coaching training** and **continued learning opportunities** during programme implementation: *“Qualifying as coaches give the programme credibility and legitimacy with a framework to operate from”* and *“as the coaches competencies enlarged, so did their tool kit. This gave the coaches the opportunity to use multiple methods of actualizing the coaching outcome.”* I reinforced this notion: *“Obtaining an accredited coaching qualification added to my confidence as a team coach. I learned to speak the business and coaching language more fluently and more authentically. It also assisted me to expand my coaching toolkit in an innovative way. As time progressed, I became more fluent in asking generative questions. I suppose I could be more in control of the outcomes achieved, with less chance of being ‘randomly successful’ ”* (Kruger, 2006).

A stakeholder mentioned that the co-coaching relationship added to **team formation** on multiple levels. *“Utilising a co-coach firstly Annie - provided cultural sensitivity; later Jeanette formed a strong, cohesive team that provided opportunity for reflection, reflexivity and adding multiple views and approaches.”* The **positive core** of this programme was clearly embedded

in its **relational worth**. *“The strong relational component of the programme, as well as the prolonged engagement was essential to both long-term business success and the facilitation of mental health. A strong team with a solid relationship makes business sense.”* Another stakeholder put it as follows: *“When it worked the mutual magic that happened between coaches and members of the team. Both felt a sense of achievement when saying goodbye.”*

A strong sense of **shared learning** and **community** transpired in the **co-coaching relationship** between the team coaches. One of the co-coaches reflected as follows: *“For me as an internal coach I most valued the relational journey of this programme. It probably was a once in a lifetime experience. The relationship Retha and I had during this journey was phenomenal. I will always remember the endless coaching conversations we had while driving to and from Swaziland. The sense of family that was built with the team. Each time we arrived in Swaziland and we heard the greetings ‘welcome home’ will warm my heart forever. Knowing we made a contribution, whether received or not, made this journey exceptional.”* An expert stakeholder noted the bond that formed between the co-coaches and observed that we *“co-supervised each other”* through our numerous reflective conversations.

My own reflections about the **co-coaching relationships** transpired as: *“I learned a lot about myself in my relationship with both Annie and Jeanette ... my biggest lesson was probably to take less control, to celebrate different perspectives and to operate from a position of cooperation instead of competition. I loved our reflective conversations. It heightened my self-awareness as a coach and contributed to improved professional coaching practices.”*

Evidence that I formed **strong interpersonal bond with the team** is reflected in the following excerpt from my auto-ethnographic naïve sketch: *“My relationship with the team grew from a position of an outsider to one where I perceived myself as an insider taking part in social responsibility activities. I formed close bonds with managers and hotel staff. I shared in their personal joys such as the birth of a new baby, the graduation of children or achieving a personal goal. Also in terms of meeting operational goals. I cared about their daily concerns, losing another family member, having to feed children that were left orphans. Ultimately, a company stakeholder perceived my relationship with the team as “too emotionally involved”. This perception raised awareness of the dynamic nature of relationships in the triangular coaching relationship. It further provided opportunity for self-reflection, leaving me with the question, was I emotionally too involved? Obviously, my first instinct would be to deny this allegation. Therefore I would rather take a reflexive stance asking: ‘How could I have managed the power dynamics in the triangular coaching relationship more efficiently?’ Reflecting back, I know that I have grown not only in the comfortable and safe relationships that I encountered during my engagement in this programme, but also in the challenging*



one's. As a team coach I needed a context of safe relationships however to nurture my "Freedom to be Positive" or as one of the respected external stakeholders once said – to be a 'good news junkie' " (Kruger, 2006). The feedback that I received from the specific company stakeholder created personal discomfort on a values level at the time, yet opening many doors for self-reflexivity. It can thus serve as another example of the generative potential inherent to paradoxical experiences.

The legitimacy of the programme was further evidenced by the **context-situated nature** thereof. A stakeholder had this to say: "Acknowledging the context during the implementation of the programme recognized the constraints on and opportunities for behaviour and attitudes in the setting. It also added to the 'realness' of the programme, the joys and the distress." She concluded: "The programme provided 'hope' in challenging times." The company stakeholders shared a similar view regarding the value of acknowledging context: "We reiterate the importance of Contextual intelligence (knowing the COMPANY core ideology)." One of the team coaches reflected on contextual learning that transpired as follows: "I learned about the Swazi culture. I learned about managers' commitment to their culture and the value of integrating their cultural perspectives in coaching, ultimately integrating the business culture with the traditional culture."

A **discussion of the findings** linked to the principles of Appreciative Inquiry follows, supported by a literature control.

### 6.3.1.2 Discussion of the findings of programme worth

The practice of Appreciative Inquiry is guided by the **constructionist, simultaneity, poetic, anticipatory, positive and free choice, enactment and wholeness principles** described in 1.5.2. Collectively these principles convey one simple message – "Appreciative Inquiry is about conversations that matter" (Whitney & Trosten-Bloom, 2003:78). Whitney and Trosten-Bloom (2003:78) identify two important aspects related to the phrase "conversations that matter". They contend that it illustrates the power of Appreciative Inquiry "to bring things to life – to literally make matter" or to focus on "what matters most to people". I agree with Reed (2007:7) that reflexive inquiry is made a lot easier by the advantage of hindsight.

Valuation data clearly indicated that the programme succeeded in opening space for different stakeholders to be heard and to speak about what matter most in the context of a cross-cultural M&A. The process of organisational change was directed through an Appreciative M&A team coaching programme that honoured language, storytelling and communication

(Whitney & Trosten-Bloom, 2003:57), thus recognising the power of the **poetic principle** or stakeholders' ability to co-author the story of a cross-cultural M&A.

**Co-authoring** occurred in an affirmative mental health-enhancing environment that transpired during team coaching meetings in spite of an organisational context that was not consistently experienced as psychologically safe (Chapter five). Leonard and Swap (2005:44) emphasise the creation of a psychological safe environment as a prerequisite for effective learning to occur: "In order to accept new knowledge, a person must have appropriate mental receptors. That is the person must be psychologically open to the new experience and have sufficient prior mental scaffolding to make it into knowledge – not just information."

**Programme participation** resulted in the construction of reciprocal meaning-making on a wholistic level. Managers were able to construct contextually driven meaning from experiences and events through conversing about it, thus realising the **constructionist principle**. Data reflected that their engagement with the programme created a context for the "liberation of power" (Whitney & Trosten-Bloom, 2003:238). In the context of this research the "liberation of power" refers predominantly to a process of personal, relational and environmental transformation. Managers took action to construct a world guided by spiritual ideals. Their programme engagement allowed them "the freedom to be known in relationship(s)", "freedom to be heard" and to reclaim their authentic voice, "freedom to dream in community", "freedom to choose to contribute" and "freedom to act with support" (Whitney & Trosten-Bloom, 2003:238/239). These actualised 'freedoms' are integral to the **positive and free choice principles** of Appreciative Inquiry.

Orem, Binkert and Clancy (2007:64) further denote the emergence of personal power to **wholism**. These authors are of the opinion that the past, present and future co-occur as an integrated whole and that people can change in ways that are inconsistent with their pasts. However, they need to be agents of their own actions and attitudes to portray self-responsibility and dignity. Without space for choice people feel trapped and resist change, no matter how desirable the change (Whitney & Trosten-Bloom, 2003:77). The **meaning-making process** relates to the 'flow' theory of Csikszentmihalyi (in Crous, 2007:16/17). He postulates that people can spend hours on a task that they find meaningful, not tearing themselves away from it. '**Flow**' is linked to work that requires active engagement, stretching our mental and physical abilities resulting in a heightened sense of consciousness. A symptom of 'flow' is self-absorbed concentration on a clearly defined goal resulting in a sense that the boundaries of the self had been expanded (Jellinghaus, 2008:2; Wesson & Boniwell, 2007:33).

**Programme participation** provided both managers and us with an opportunity to connect with our “own inner flow” (Orem, *et al.* 2007:72). Managers were granted the freedom to see themselves in a wholistic way. In our role as team coaches we constructed personal meaning related to an expanded vision of our purpose in the context. The process of positive meaning-making was relational in nature. ‘**Flow**’ was a natural response to the absorbed coaching activities in a coaching context that managers and we perceived as both fulfilling and challenging simultaneously.

Frankl (1959:110) explains the concept of **contextual, here and now meaning-making** as follows: “What matters most is not the meaning of life in general but rather the specific meaning of a person’s life at a given moment. To put the question in general terms would be comparable to the question posed to a chess champion, ‘Tell me Master, what is the best move in the world?’ There simply is no such thing as the best move ... apart from a particular situation in a game and the particular personality of one’s opponent. The same holds for human existence. One should not search for abstract meaning of life. Everyone has his own specific vocation or mission in life to carry out a concrete assignment which demands fulfilment.”

The **construction of meaning** in a context of organisational change, with specific reference to a cross cultural M&A, is a significant contribution of any intervention that aims to merge two corporate and national cultures to ensure sustained performance. In the problem statement I referred to an experience of meaninglessness that is prevalent in organisational settings exposed to M&A activities. This notion was confirmed during the situational analysis (Chapter four) when managers referred to the alienation effects of previous M&As. Covey (2004:18/19) describes how industrialisation and technological proliferation have contributed to a working context reflecting a meaning vacuum, while Schumacher (*in* Visser, 2004:20) notes that Western economics tend to reward work that is essentially self-centred. Whitney and Trosten-Bloom (2003:78) warn against traditional organisations that follow an established chain of command leadership style resulting in one-way communication. This is evident in organisations where people at the top create the organisations’ future with one another and then roll it out to reporting staff while hoping for a committed work force that would follow through (Whitney & Trosten-Bloom, 2003:78).

Visser (2004:21) refers to the three paths of meaning, namely **doing, experiencing** and **suffering** respectively. In the context of this research **meaning** were constructed through the **expression of values** in all three these paths to meaning. From a wholistic viewpoint both managers and team coaches increased their capacity to do, to experience and to construct meaning, both in times of joy and times of suffering. The vehicle of meaning construction, as

mentioned above, was predominantly conversational in nature. **Enactment** – or being the change that you desire – transpired in this process of meaning-making. Both coaches and managers could role model new behaviour that could be cascaded to transform the lives of others.

The **M&A orientation intervention** succeeded in bringing stakeholders in the triangular coaching relationship together to **discover, dream** and **design integration practices** they most valued and desired. These positive interactions supported the realisation of **positive change** in practice. It involved **direct collaboration** with members in top positions, such as the Chief Executive Officer and other company directors, as well as peers, to generate collaboration. The importance of generating buy-in from organisational leaders in M&A team coaching programmes was confirmed by my former research (Visagie, 2002). The situational analysis additionally gave evidence of managers' appreciation for leadership practices that facilitated personal and organisational security (4.3.3), defined as principle-centred leadership in Chapter five (5.2.2.2). Cooperrider and Whitney (2005:45/46) agree that company leaders should participate equally in the meaning-making process as “positive change catalysts”. They argue that it is imperative that company leaders should engage in generative conversations with organisational members and expect the best from them. Company leaders should further be truly interested in the hopes and dreams of organisational members.

The **collaborate process** continued during the **M&A implementation intervention**, but in a different way. The **process of collaboration** shifted to the realisation of the coaching mandate of the company with the intent to integrate members into the company culture, living the company's core ideology expressed in the “O” way. The **transformational consequences** of organisational conversations were: **reclaiming voice, enhanced levels of engagement, team cohesiveness** and **hope for the future** (Chapter five). In essence, these transformational consequences reflect the notion that human beings have an inbuilt propensity towards self-realisation (Yalom, 2002:1). Secondly, human beings are not objects needing to be motivated and controlled; they are multi-dimensional – body, mind and spirit (Covey, 2004:21). Through collaboration the **anticipatory principle** was met, namely to generate an affirmative image of the future that directs current actions and behaviour in a constructive way.

The **programme approach** was embedded in a **multidimensional process** of inquiry, reflecting the principle of **simultaneity**, meaning that the **coaching tools and techniques** that we employed fostered positive change. We commenced the coaching relationship from a **generative stance**, asking managers and ourselves questions that prompted new thinking and answers about the past, present and future (Orem, et al. 2007:66/67). A premise of simultaneity is that the “very questions we ask of ourselves and of our clients laser attention in

a certain direction, intended or not, and sow the seeds of change” (Orem, et al. 2007:65). We used **generative conversational skills** and asked **generative questions** (Bushe, 2007:4/5) that was integral to the Appreciative M&A team coaching process. **Reflective practices** were a further vital part of the generative inquiry process.

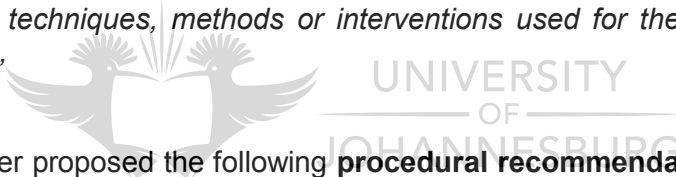
It can be concluded that **this is a worthy programme** because **it met its destiny, scientific criteria of worth**, as well as the **guiding principles of Appreciative Inquiry**. The findings of the valuation conducted by the managers in the second phase of the research (Chapter five), as well as the data obtained from the expert stakeholder group, verify that the **programme succeeded in achieving its destiny**, namely transformed and integrated managers that were able to sustain performance related to mental health facilitation. With reference to the criteria of worthiness adapted from Guba’s Model of Trustworthiness (in Krefting, 1991:214–222), the data confirmed that **programme implementation was guided by a credible programme design and methodology**, reflecting structural coherence and programme agent authority; it has **future applicability value** because of the dense description of the programme structure and process incorporating contextual programme realities; the **programme is confirmable** as evidenced by applied practices of triangulation and reflexivity. It further **met the dependability criterion** of offering a densely described conceptual, analytical and interpretative framework for repeating the programme.

From an Appreciative Inquiry perspective the programme succeeded in **eliciting stakeholder collaboration, cooperation and participation** (Preskill & Catsambas, 2006:39). It employed a variety of perspectives to generate understanding about the unique context and clearly established a linkage between sustained performance and mental health facilitation in a context of company culture integration. Essentially, it created the conditions for the constructionist, simultaneity, poetic, anticipatory, positive and free choice, enactment and wholeness principles to be alive in a dynamic organisational context.

### **6.3.2 What Recommendations Can Be Proposed To Enhance The Future Applicability Of The Programme?**

The next section describes the **wishes of the external stakeholder group** to enhance the worth or future applicability of the programme, including an **auto-ethnographical account** reflecting my personal wishes in this regard. An **integrated discussion of the findings, recommended programme refinements** and a **literature control** to place the findings in the context of established knowledge, to support personal arguments and new contributions, are presented (Morse & Field, 1996:107).

Echoing my personal wish for a **“higher degree of competence in the integration of Appreciative Inquiry and team coaching in the M&A implementation intervention specifically”**, a stakeholder wrote: *“The originators of appreciative inquiry have never demanded formal training or certification for practicing this positive approach to development and change. They, in fact, encourage innovative interpretations and applications thereof – which the candidate/coach has done. Having stated that, I nevertheless am of the opinion that the programme can be enhanced by the choice of an affirmative topic, as starting point (framed specifically in terms of appreciative coaching). To be followed up with an interview guide consisting of generic and topic specific appreciative, unconditionally positive, questions. When this guide is used for interviews in pairs, a multitude of positive stories based on positive experiences are shared, from which the team’s positive core is discovered. A shared sense of their positive core (grounded in lived experiences) should enable the participants to envision a healthy future for the team members and their organization. With this positive image in mind they should be able to enact it in an innovative way ... embarking on a journey of becoming skilled improvisers, able to sustain performance. I would like to challenge the candidate/coach to combine both the implementation and team formation into a single appreciative coaching process. Orem, et al. (2007) may serve as an example. This does not imply that the other techniques, methods or interventions used for the current programme, should be excluded.”*



The same stakeholder proposed the following **procedural recommendations** to enhance the future applicability of the programme: *“For a future M&A coaching intervention I would suggest that during the discovery phase members from the one organization should interview members of the other organization (i.e. every interview pair should have a representative from each of the two merging organizations). It is then for each interviewer to discover, by means of the appreciative questions, what is strong and working well in the other organization. These themes should be documented on flip chart paper, visible to all. Subsequently all participants should democratically vote for those strengths and positive qualities, originating from both teams and organizations, that would be of the greatest advantage to the newly merged organization, envision what their common future would be like should the new collective be guided by this new “positive core”, what should be designed to sustain it, and what actions should be taken for a destiny of optimal performance.”*

A stakeholder referred to **relationship challenges in the triangular coaching relationship** mainly related to power inequalities. These relationship turbulences seemingly influenced team morale and filtered through to performance practices: *“A wish would be that all stakeholders shared and lived the appreciative approach. It was difficult to build the team, in terms of morale, relationships and business results just to have it destroyed by toxic criticism*

or irreverent feedback practices. These practices sadly was my reason for ending my relationship with the company and therefore also the team.” This stakeholder also shared a reality of competing paradigms in the triangular coaching relationship that interfered with the constructionist nature of the programme: “... although the intent was honorable (to include multiple voices), the realization was not always attained as power relationships remained alive”. Another stakeholder affirmed this reality and referred to “paradigm clashes between the team coaches and company stakeholders”. She expressed a wish for the “company stakeholders to walk the journey with us from a less critical position” and a wish for a “nurturing voice” in her relationship with company stakeholders, in order to “see this programme sustained to the end within a context of Appreciative Inquiry”.

In line with the relationship challenges in the triangular coaching relationship, I wrote: “I wish I felt more appreciated in my relationship with the company stakeholders. Personally, I believe that the programme achieved its destiny to transform managers and to improve integration within the context of a cross-cultural M&A based on mental health facilitation. Programme participation assisted managers to grow in confidence, to be a more cohesive team and to execute operational goals more consistently. The intent of appreciation was visible in some executive strategies, such as celebration rituals, investment in ongoing coaching and employee recognition activities. Yet, I wish that the company culture displayed a more congruent appreciative approach as evidenced in its way of being. I wish for a less conflicting relationship between the management team and the General Managers. The findings of the research indicated that power struggles between the management team fuelled the three “R’s – resentment, resistance and revenge”, ultimately influencing performance patterns in a negative way. Data and personal engagement in this context have convinced me that the interplay between external environmental demands and internally driven survival strategies of stakeholders involved in this intervention interfered with authentic company culture integration in the end, raising an important question regarding the long term programme sustainability in this context.”

According to Cooperrider and Whitney (2005:46/47) it is crucial that Appreciative Inquiry should be a “**relational leadership practice**” based on the notion that leaders should send an unambiguous and consistent message that positive change is the pathway to success in the particular company. They propose that a **leadership advisory team** should be formed to provide leaders with guidance and resources for the process. The advisory team should work closely with the Appreciative Inquiry consultant or team coaches in the context of this research to ensure ongoing planning, design and delivery of the programme. They should be selected for diverse backgrounds, functional experience and organisational responsibility. These authors suggest that the advisory team should consist of three to six senior leaders committed

to the success of the programme. In a hospitality environment it would be crucial to include the General Managers as equal partners in the process.

It is the responsibility of the **advisory team** to select **affirmative topics** in conjunction with the team coaches, to create an **interview guide** when applicable, to determine the **interview strategy** and to **valuate the results**. They should additionally **communicate best stories**, as Appreciative Inquiry champions' leaders should understand the assumptions of Appreciative Inquiry prior to commencement of the programme. This is in line with Reed's (2007:56) viewpoint that "knowledge and social action go together".

The **selected leaders** should plant the Appreciative Inquiry "seeds and nurture the best in others" (Cooperrider & Whitney, 2005:45). During the programme their active positive participation is crucial for programme success. After the programme the team coaches leave the setting. Company leaders stay behind with the important responsibility to "lead by affirmation" and plan follow-up Appreciative Inquiry projects, thus living the Appreciative Inquiry principles (Cooperrider & Whitney, 2005:47). The core of this relationship is clear role clarification and contract agreement from the start of the relationship between the team coaches and company stakeholders.

My **personal reflections** additionally emphasise **two complementary wishes**, namely a wish to have entered the context from a **more cultural sensitive perspective** and **to engage in a professional coaching supervision relationship**: *"I wish I had a better understanding of the Swazi culture when I entered the setting. A deeper knowledge of managers' cultural practices and beliefs would have aided me to understand certain behavioural practices better, such as managers' initial unwillingness to confront managerial issues or to have team coaching on Saturdays because of family obligations. I wish I had external professional coaching supervision. The company provided internal group supervision opportunities. I benefited from these opportunities in terms of professional development. On a personal level, I think it is crucial to engage in a coaching supervision relationship where relationships of power do not interfere with effective learning. Lastly, I wish that I was able to integrate Appreciative Inquiry more efficiently during the M&A implementation intervention in the context of the company. I believe as a team coach I predominantly succeeded in living the principles of Appreciative Inquiry, but I lacked knowledge and experience regarding the practice thereof. Additionally, the coaching mandate of the company had specific coaching requirements that did not consistently fit this approach."*

The programme's worth can be enhanced by the **facilitating of intercultural learning**. **Intercultural learning** is selected as an appreciative topic choice during the early stages of



the M&A orientation intervention followed by the application of the 4-D Appreciative Inquiry approach. Seo (2007:10) agrees that intercultural workshops and presentations are a useful method to facilitate multiculturalism in the presence of companies with distinctive cultures that merge. Intercultural learning is essential to build powerful partnerships. Hargrove (2000:165) contends that “productivity is often just a by-product of relationships”.

**Staying resourceful** as a coach through **coaching supervision** was identified by a stakeholder as follows: *“The demand on the resourcefulness of the coaches is every minute of the contact, with (ideally speaking) no slippage ever (no excuses either for losing one’s temper and/or blaming the group), which is why the expensive luxury of 2 coaches. The integrity and authenticity of the coaches could also be about accountability to each other, rather than a conspiracy and to give each other permission to be “against” the group.”* This viewpoint elicits the need for formal coaching supervision during the facilitation of an M&A team coaching programme, engaging both coaches in a resourceful learning process.

**Developing coaches** is an important aspect to ensure the success of coaching interventions. **Coaching supervision** refers to the relationship between the team coach and a professionally qualified coaching supervisor to facilitate resourcefulness of the coach. **Resourcefulness** implies the coach’s ability to optimally use resources in his or her internal and external environments, ensuring positive personal growth and desired coaching results. In this case it would be advisable to obtain coaching supervision from a coach with a solid grounding in Appreciative Inquiry. The supervision process ought to include educative, restorative and normative aspects (Clutterbuck & Lane, 2004:102; Hay, 2007:5). The former refers to the supervisee’s learning and development, the second to the supportive functions of supervision whereby the supervisor attends to the well-being of the supervisee and, finally, to the ethical and professional deliberations (Howard, 2008:106).

The company stakeholders suggested that “**destiny**” and “**outcome**” should be used as **synonymous concepts** aligned to Appreciative Inquiry in the conceptual framework. They further requested *“more specific reference of integration within the COMPANY CULTURE”*, based on a perception that *“team members need to buy in and live the company culture to perform, otherwise they will exit”*. These refinement recommendations were adhered to during the formative programme refinement activities that were conducted during programme implementation (Chapter five). The concept “outcome” as suggested by Dickoff, et al.’s (1968:423) thinking map was replaced with “destiny”. Managers’ integration within the company culture was a crucial aspect of the programme’s destiny and I ensured that it was portrayed as a central concept.

Anstey (1999:304) agrees that there is recognition at the top of organisations that 'buy-in' is necessary for effective change, but it is often tempting to scuttle through this in a series of mobilising meetings that does not include the voices of all stakeholders. Data obtained during the situational analysis gave evidence of a **history of insufficient company culture buy-in** during the previous cross-cultural M&A in this hotel. This was essentially linked to managers' sense of exclusion in their relationship with the management of the acquirer at the time. Data of the second phase of the research confirmed that buy-in in the company culture was again challenged by specific organisational processes during the cross-cultural M&A between the Southern African hospitality environment and the hotel in Swaziland, such as the restructuring process that shook their trust in the company soon after the acquisition. One of the team coaches commented on this process as "*and then the storm came*". The sense of despair that managers felt was directly linked to a direct threat to job security and the welfare of their families in a high unemployment environment (Anstey, 1999:23).

**Company culture integration** was further impaired in relation to managers' interpersonal conflicts with the different General Managers in this setting, posing a threat to their mental health on the one hand, yet at the same time providing them with the opportunity to ultimately reclaim their voices in the context of difficult interpersonal relationships. Company culture integration was therefore achieved in a paradoxical way. Managers initially resisted certain company requirements such as singing the "O song" during team coaching meetings, adhering to the five stretch goals, completing their homework assignments and cascading coaching information to their direct reports. Yet, they started to execute managerial actions that they bought into during the course of programme implementation, indicating an increased sense of identity and belonging, commitment to goals larger than those held by individuals or departmental groups and the emergence of a set of common behaviour standards (Anstey, 1999:329).

A **refinement recommendation** would be to **sustain the positive energy** that the Appreciative M&A team coaching programme achieved during the M&A orientation intervention, with a focus on internal organisational consistency in living appreciative practices related to all stakeholders involved, thus **building an integrated organisational identity** sooner to lay a behavioural foundation that will sustain performance. Anstey (1999:329) is of the opinion that "an organisation's culture is a product of shared learning over time". Company culture integration reflects the sharing of core values by the majority of an organisation's stakeholders. Merging existing cultures – both traditional and business wise – demands a "transformation of the soul of the organisation" (Anstey, 1999:329). The behaviour of top management is crucial in modelling new behaviour and roles (Anstey, 1999:329). It may

be necessary to generate new stories, rituals and symbols to replace those currently in existence (Seo, 2007:9).

A further question posed by the company stakeholders was: *“Why the reference to family stories and why not rather focus on where we are going? The genogram of the team members and his/her direct reports? – roles they play in the company and where they would like to go etc.?”* I agree that the genogram did not provide the outcome that I envisioned as a team coach. I thought that it would liberate managers to be known in their working relationships (Whitney & Trosten-Bloom, 2003:238).

The technique of **compiling a genogram** is a therapeutic intervention underpinned by Bowen’s psychodynamic model of family therapy (Becvar & Becvar, 1996:155). The purpose is to support people to know one another as they are and the family unit as it is rather than to establish peace and harmony (Becvar & Becvar, 1996:156). This intervention facilitates increased self-differentiation of family members related to gaining more insight into intergenerational family patterns. Self-differentiation starts as a personal, individual process and ultimately progresses into the transformation of relationships in the whole family system (Becvar & Becvar, 1996:155). Senge, *et al.* (1999:272) support the use of genograms as part of organisational change programmes in sustaining transformation. These authors are of the opinion that aspects of employees’ family histories may assist them to determine their responses under stress and anxiety (Senge, *et al.* 1999:271).

My observational field notes reflect that **managers found it challenging to compile personal genograms** related to their unfamiliarity with the structural aspects in particular. I additionally had a sense that, at the time I did this activity, the level of self-disclosure expected from them was too high. It took place during the second day of the M&A orientation intervention and, in hindsight, I realised that managers were not part of a cohesive team at that stage, but rather a group of people working together. A refinement recommendation is that the activity is adapted within an M&A Appreciative team coaching framework to elicit the future value of viewing the work environment as a family setting and colleagues as part of your organisational family. The activity should be scheduled during the M&A orientation intervention to assist stakeholders to create awareness of the future possibilities of viewing yourself as part of an organisational family.

I suggest that this activity is conducted after the discussion about performance management (session five) to align the process of Appreciative Inquiry with the performance expectations of the acquiring company (day three). During the discovery phase the team coach can request different company stakeholders to conduct interviews in pairs based on the affirmative topic

choice – visions of possibilities to sustain performance within the context of an organisational family engaged in a cross-cultural M&A. The stakeholders should include managers, their direct reports and company leaders to co-create alliances and partnerships in a context of a cross-cultural M&A. Cooperrider and Whitney (2005:16) suggest that discovery should mobilise the whole system by engaging all stakeholders in the expression of strengths and best practices.

The **Appreciative Inquiry interview schedule** can include the following aspects:

- What is your best previous experience of being a member of an organisational family?
- What made it a high point?
- What are your biggest strengths as a member of this merged organisational family?
- How do you envision that your strengths will support best practices in this merged organisational family?
- What do you believe to be vital traditions in this merged organisational family?
- How can these traditions be kept alive to sustain performance in this merged organisational family?
- Where do you see yourself going in this merged organisational family?
- What are your wishes to sustain performance in this merged organisational family?

Thereafter, the stakeholders involved in this process should be assisted to create a clear **results-oriented vision** based on the discovered performance potential of the organisational family. A question that might be asked is: “What is the organisation calling us to be as a family that meets performance expectations?” The **dream phase** compels stakeholders to listen to stories of organisational life at its best and to share images of their hopes and dreams for their collective future (Cooperrider & Whitney, 2005:27). The **design phase** should follow based on crafting an action plan magnifying the positive core of the calling to be a performing organisational family. **Destiny**, as the final phase, would entail strengthening the affirmative capability of the whole system for ongoing positive change and high performance (Cooperrider & Whitney, 2005:16).

The company stakeholders lastly questioned the fact that I have not made reference to the **“process of change”** as described by **“Lewin”**. I had consciously decided to focus on change from a positive perspective related to the guiding theoretical framework of this research, namely Appreciative Inquiry. Positive change steers away from modernistic paradigms that commence with a clear definition of the problem, thus constructing change as a problem in need of a solution. A deficit-discourse is integral to these approaches embedded in the basic assumption that an organisation facing change is a problem to be solved (Cooperrider & Whitney, 2005:13).

Lewin's three-step change model (Kritsonis, 2008:1/2) of unfreezing, changing and refreezing was postulated in 1951 and fits a problem-solving approach to change. It departs from the notion that the existing organisational situation should be unfreezed to overcome the strains of individual resistance and group conformity during a process of organisational change. A second step implies that employees should be persuaded that the status quo is not beneficial to them and they should be encouraged to view the problem from a fresh perspective to generate the desired organisational change. A third step implies refreezing, entailing the integration of new values into the company culture through personal and collective reinforcement measures such as developing a new self-concept or adhering to policies and procedures.

Lewin's theory of change does not fit a positive change philosophy based on the inherent beliefs that the status quo is problematic and should be fixed. I agree with Kritsonis (2008:6) who argues that Lewin's model is rational, goal and plan oriented, but it does not provide a wholistic model of organisational change. Human feelings and experiences are marginalised in this model and external and internal environmental conditions that can influence change are not taken equally into account. It is further a linear model that implies analysis of causes instead of envisioning what might be (Cooperrider & Whitney, 2005:13). Team coaches that use an Appreciative M&A Inquiry approach should introduce Appreciative Inquiry to the organisation and present a business case for using this proposed positive revolution in change (Cooperrider & Whitney, 2005:47).

#### **6.4 CONCLUSION**

This chapter focused on a description of the expert and auto-ethnographic programme valuation and refinement of an Appreciative M&A team coaching programme to facilitate the mental health of managers for sustained performance. The objectives were to generate evidence of the worth of the programme, as well as to propose summative programme refinements. The findings confirmed **programme worthiness**. It succeeded in facilitating the mental health of managers for sustained performance. It can be concluded that the Appreciative M&A team coaching approach liberated managers to reclaim multiple freedoms. These freedoms allowed for a diversity of perspectives and generated active stakeholder involvement in meeting the programme destiny, as well as in living the process and in forming generative relationships. **Programme refinements** make a case for authentic involvement of a number of organisational stakeholders to ensure that Appreciative Inquiry is integrated into daily organisational life. Chapter seven concludes the thesis with an evaluation of the research process, conclusions and recommendations.

# Chapter 7

## RESEARCH JUSTIFICATION, LIMITATIONS, CONCLUSIONS AND RECOMMENDATIONS

*“I...have a naïve trust in the universe – that at some level it all makes sense, and we can get glimpses of that sense if we try.”*

(Michaly Csikszentmihalyi, 2008:1)

### 7.1 INTRODUCTION

My point of departure in this Chapter is valuative in nature. In a **final quest for sense-making**, justification for the research will be provided, and the limitations thereof will be addressed. I shall finalise my conclusions and propose recommendations that emanate from this research for business coaching practice, education and research.

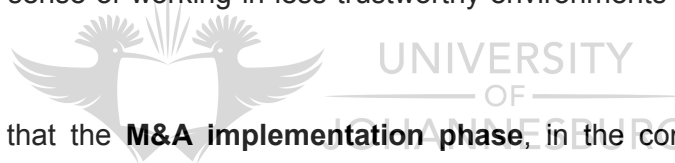
### 7.2 RESEARCH JUSTIFICATION

According to Grubb and Lamb (2000:148), “The business landscape is exploding with breathtaking innovations, and it will only continue to grow in complexity and competitiveness.” This research emerged against the backdrop of a hospitality environment exploding with organisational changes. **Cross-cultural M&As** are an intrinsic part of the worldwide changing architecture of the business sector. The South African hospitality environment is no exception. Globalisation as well as hospitality groups’ pursuit for expansion and economic growth fuel cross-cultural M&As nationwide. Empirical evidence on the management of this complex organisational change phenomenon has indicated a **diminished leadership focus on human due diligence** and **cultural integration practices** (Harding & Rouse, 2007:124/125; Seo, 2007:4). **Human suffering** is an integral consequence of leadership practices that disregard conscious attention to operational managers’ emotional and behavioural responses to change in particular. Ultimately, **cross-cultural M&As** are reported to have a **high failure rate and low profitability** (Mitchell & Hill, 2004:23; Risberg, 1997:257).

Closely related to the marginalisation of human due diligence and fragmented cultural integration practices, is the **deficit-oriented organisational discourse** that infests these change management interventions. This discourse is a legacy of the modernistic era. It claims that organisations, as social entities that are bound together to achieve a common goal, can be fixed or repaired to achieve sustained performance (Senior, 2002:124). The sad reality is, however, that this discourse triggers dichotomous perceptions regarding organisational

aspects and people. Simply put, people are judged as either good or bad. I have similarly found that a person, who is perceived as talented, is labelled an 'asset' by company executives. A person, whose behaviour creates discomfort due to patterns of protest, is labelled 'dead wood'. Observed **patterns of protest** are a reality in most companies exposed to M&A activities. It manifests in different forms and filters through the organisation horizontally and vertically as "productive resistance", "soft coercion" or passive aggressiveness (Clegg, Courpasson & Phillips, 2006:18). These **patterns of protest** often symbolise managers' emotional distress, and might be a reflection of how they construct meaning of the perceived alienating and paradoxical nature of organisational change processes. Their perceptions could ultimately threaten their mental health.

This discourse mirrors **power as a major factor in organisational performance** – power to fix versus power to enable in a positive way (Clegg, et al. 2006:17). Or as Clegg, Courpasson and Phillips (2006:29) argue: "At the core of modern organizations there is a heart of darkness, one which stains not only history but also present realities." **Organisational tensions** can be understood based on **economic tensions** on the one hand and the growing **distance created between individuals and decision making arenas** on the other, thus creating in people a sense of working in less trustworthy environments (Tilly in Clegg, et al. 2006:398).



Research indicates that the **M&A implementation phase**, in the context of cross-cultural M&As, has a **high risk for organisational tensions to accelerate** (Seo, 2007:19). **Appreciative Inquiry** has emerged as a recent organisational change paradigm, celebrating human potential and the generative ability inherent to paradoxical realities (Cooperrider & Avital, 2004:xi). The need for positive organisational change has gained increasing acknowledgement in research and business today (Cameron, et al. 2003:8). **Business coaching** – with specific reference to team coaching – is a relatively new field in organisational development that harnesses human potential and growth. **Recommendations** for conducting research that specifically addresses tensions related to M&A implementation processes have been made in previous studies. A **current limitation in M&A literature** is identified as a lack of pragmatic, theory driven approaches to manage this form of organisational change (Seo, 2007:6). Numerous quantitative retrospective studies are available that address the problematic nature of M&As according to Seo (2007:6). These studies, based on a need to generalise findings, often lack descriptive elements needed to ensure contextual clarity. I agree with a statement made by the actor Kevin Spacey in the film *American Beauty* (in Patton, 2002:61): "Any single act from any single person, put out of context, is damnable." The deficit-based orientation further results in a **need for research on strength-based M&A implementation practices**.

Sparrow (*in* Senior, 2002:202) predicts that “we shall witness fundamental transitions in forms of work organisation”. He raises a concern regarding the “deterioration in the psychological contract that has been experienced by those who have lived through an era of downsizing”, emphasising the importance of developing new competencies to deal with the changes in work design. This means that there is an **increasing need for pragmatic programmes** that will form part of companies’ organisational development. The extent of knowledge and skills transfer is predicted as a factor in determining the success rate of companies facing M&A activities. Knowledge and skills transfer does not happen in a vacuum. It requires social interaction and exchange that culminate in collaboration, thus emphasising the need for cross-cultural M&A programmes solidly grounded in wholism.

Based on the above justifications, I feel confident that the research has made an **original contribution** to the scientific body of knowledge where business coaching is concerned. It has indirectly contributed to psychiatric nursing sciences’ body of knowledge. There is a close connection between business coaching and psychiatric nursing science. Both fields endeavour to facilitate healthy interactions between people’s internal and external environments, thus facilitating transformation and integration on multiple levels. The **unique contribution of an Appreciative M&A programme** “*rich in methods and techniques that collectively opened up possibilities for positive change*” was confirmed by a stakeholder who declared: “*The candidate had the insight to recognize the value of appreciative inquiry for enhancing coaching long before Orem, Binkert and Clancy (2007) had their book on appreciative coaching published. Moreover, she realised the value of appreciative inquiry’s principles as the foundation for implementing the programme. It seems that these principles guided the candidate/coach to introduce a programme rich in methods and techniques that collectively opened up possibilities for positive change.*”

I **successfully married two complementary organisational development strategies** into an integrated whole, namely **Appreciative Inquiry** and **business team coaching**. During the period of finalisation of the research, the integrated Appreciative M&A team coaching approach was cross-contextualised to two Higher Education Institutions as a vehicle for enhancing research output. Both these interventions were research-based, and are envisioned to produce peer-reviewed journal publications, thus confirming the contribution of the research outcome for knowledge transfer in diverse fields.

### 7.3 LIMITATIONS AND PRACTICAL CHALLENGES

The single biggest challenge I experienced as a researcher was related to the **amount of data I collected** over a period of three years in the field. Paradoxically, my quest to ensure



prolonged field engagement created numerous demands for reducing data in a legitimate fashion. I had to stay true to stakeholder experiences, whilst documenting the story in a succinct manner. I think I am still learning this skill. This researcher's challenge could have been reduced by spending the time in the field in a more strategic fashion, meaning less time spent in the field without compromising the richness of collected data. The M&A implementation intervention could have been diminished to ten focused team-coaching meetings before summative valuation, thus reducing the field experience to eighteen months. On the other hand, the findings of the research indicated that sustained performance was evident only from the middle of the third year.

My **relationship with the company stakeholders** resulted in numerous ethical challenges related predominantly to expected feedback practices and clashing paradigms. The company stakeholders requested clear feedback on managers' performance, including a need for identifying information. As a researcher, I could not oblige on ethical grounds. I was often caught amid the paradox of meeting the expectations of company stakeholders whilst protecting the rights of the managers. Paradoxical role expectations created problems for the realisation of both my roles as a researcher and a team coach. Additionally, it had a negative effect on my personal wellness, triggered by ambiguity between what could, and what could not be said. **Member checking** with managers, and the **supportive relationship** between me and the co-coach, alleviated the tension. My **perceived vulnerability** at times was also linked to my commitment to the auto-ethnographic genre, meaning that I was committed to join my own experiences and feelings in a legitimate way with those of other stakeholders (Foster, et al. 2006:49), and, as a result, exposing myself to critique and feedback from others.

**Technical challenges** emerged as problems with the sound quality of the audio-recorded focus groups, resulting in data loss. The triangulated data collection approach compensated for data loss. Fortunately, the repetition of themes related to these data collection interventions suggested data saturation.

I selected Appreciative Inquiry as the guiding paradigm for this research. **Appreciative Inquiry** presents a form of "social construction in action" (Reed, 2007:viii). I must confess that I initially **lacked clear understanding of the pragmatic realisation of the assumptions of Appreciative Inquiry**. This resulted in the structuring of data collection questions during the first phase of the research that did not focus on the positive core of the organisational change. I asked managers what **differences as well as similarities** they experienced regarding their M&A change experiences when compared to the findings of my previous research (Visagie, 2002). Within a constructionist perspective, **language is seen as constructing reality**. The knowledge that I discovered would therefore be embedded not only in the type of questions

that I asked, but also in how I asked it during the data collection process (Reed, 2007:viii). I am curious to know how the findings would have differed had I asked questions that were aimed at evoking life-giving M&A stories in Phase one, such as:

- What worked for you in relation to the present M&A change?
- What are your wishes for improved M&A implementation practices?

#### 7.4 CONCLUSIONS

I ventured into this research driven by two research questions, namely:

- Can an existing M&A team coaching programme to facilitate managers' mental health for sustained performance be applied to a Southern African hospitality environment?
- If the programme is applicable, how should it be refined, implemented and valued as a foundation to generate a worthy Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance in a Southern African hospitality environment?

The **ultimate aim** of this research was, therefore, to generate a **worthy Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance** in a Southern African hospitality environment. In order to achieve this aim, the research was conducted in **three phases** reflecting a **programme valiative cycle** with specific objectives. During the **first phase** I conducted a **situational analysis** to explore and describe managers' experiences of a cross-cultural M&A, as well as their recommendations for improved M&A implementation practices. My intent was to establish the applicability of an existing M&A team coaching programme in a Southern African hospitality environment, representing a cross-cultural context. The focus of attention of **the second phase** was to describe a refined conceptual framework of an Appreciative M&A team coaching programme to facilitate managers' mental health for sustained performance in a Southern African hospitality environment, incorporating programme implementation guidelines based on the findings of phase one, followed by programme implementation. Thereafter managers' experiences of programme implementation were explored and described to value the worth of the programme and to ensure continued programme refinement. During the **third phase** I valued programme worth from an expert stakeholder group and auto-ethnographic perspective, followed by the generation of programme refinement recommendations to improve future programme applicability in a similar context.

A **qualitative, evaluative research design, theory generating in nature, complemented by an auto-ethnographic strategy** was followed to realise the objectives integral to the research aim. I met the criteria of the abovementioned research design and strategy by being

actively involved in the world that was being studied, from an insider perspective, fulfilling simultaneously the role of researcher and team coach (Denzin & Lincoln, 2000:3). I studied the research phenomenon in its natural setting over a period of three years, thus meeting the criteria of prolonged field engagement (Babbie & Mouton, 2001:270; Denzin & Lincoln, 1994:214). I followed an ideographic approach, meaning that I generated a dense description of the lived experiences of stakeholders, including my own experiences, based on a description of how we made sense of it (Babbie & Mouton, 2001:272). The research focus was process rather than outcomes oriented, with a preference for wholistic understanding of events, actions and processes (Babbie & Mouton, 2001:270–271). I adhered to qualitative data collection and analysis methods, generating a multi-voiced research text reflecting interpretations of stakeholder experiences in the three interrelated research phases. Finally, I extended the literature through a process of theory generation (Morse & Field, 1996:107).

One of the fundamental insights I have gained through my engagement with the research is that the **programme offered a way to improve the lives and mental health of the managers** as a key stakeholder group, as well as my own (Ellis in Denzin & Lincoln, 2003:229). Based on this assumption, I believe that the **research succeeded in meeting its destiny**, namely to add a worthy Appreciative M&A team coaching programme to the field of business coaching. The situational analysis raised awareness in me regarding universal experiences related to M&A change, with a clear view on the paradoxical nature thereof. Programme implementation and valuation convinced me, however, of the unique contextual intricacies. In conclusion, I want to stress that cross-cultural M&A experiences must be seen in its contemporary organisational context; it cannot be conceptualised as abstracted from those contexts in which it is embedded.

The research raises a multitude of questions that are left open for future investigation. How open is the hospitality environment for comprehensive integration of Appreciative Inquiry principles in its organisational development strategy? Why do pervasive patterns of miscommunication prevail during M&A implementation in spite of the huge amount of research attention directed to the communication aspects of this phenomenon? What is the role of losses related to HIV/AIDS on the mental health of managers working in an environment infested with this form of existence pain? How can traditional and Western ways of working be integrated to ensure authentic cross-cultural M&A integration? How can team coaching be cascaded to lower levels of organisational members to sustain performance? How can the triangular coaching relationship be managed in a perceived context of power inequalities? How culturally congruent is written reflections as a source of personal and collective growth in the Swazi culture?

## 7.5 RECOMMENDATIONS

The research recommendations focus explicitly on business coaching practice, education and research.

### 7.5.1 Business Coaching Practice

Business coaches should **facilitate buy-in from all stakeholders** in Appreciative M&A team coaching programmes. For this type of programme to reach its potential it needs to begin with theoretical knowledge of the integrated Appreciative M&A team coaching approach, or as Cooperrider and Srivastva (1987:1) declare, "... through our assumptions and choice of method we largely create the world we later discover". The proposed knowledge transfer entails **dialogue with company leaders and intended programme recipients** regarding the use of an Appreciative M&A team coaching approach to facilitate company culture integration, its methods and intended outcomes. These preliminary conversations are essential to prepare stakeholders and to assess the context's readiness for this kind of organisational change approach. Whitney and Trosten-Bloom (2003:210) agree that it is crucial to **identify organisational design preferences**.

Business coaches should design programmes in collaboration with other stakeholders as mentioned above, but should **ensure that these programmes are well structured and thought through**. It is proposed that an Appreciative M&A team coaching programme should be assessed after the 10<sup>th</sup> M&A implementation coaching meeting to obtain clear evidence of its results. The business coach must **liberate stakeholders to integrate Appreciative M&A team coaching into existing processes and practices**, creating new systems and structures on a daily basis (Cooperrider & Whitney, 2005:47). A recommended practice to ensure that organisational learning takes place in a pragmatic way would be to **cascade the process of Appreciative Inquiry to other employees** in the company. These employees will then form part of the co-creation and cooperative learning in a context of a cross-cultural M&A. Appreciative Inquiry will then become an organisational-wide invitation to join in the positive change revolution, meeting others who might have been considered "them", thus actively merging organisational cultures to sustain change and performance (Cooperrider & Whitney, 2005:48).

Business coaches should **engage stakeholders in dialogue** regarding selection criteria of intended programme recipients. The invitation to join these programmes should be from a non-coercive position, demonstrating the freedom to choose. It is further proposed that business team coaches should **facilitate the creation of an affirmative mental health**

**enhancing environment** through role-modelling cultural sensitive communication practices and the realisation of organisational values like respect, human dignity and recognition. The **inclusion of intercultural learning meetings** should form part of the overall programme to ensure successful cultural integration between the different national and organisational cultures. This will sustain positive organisational change based on the realisation of the underlying principles of Appreciative Inquiry.

It is proposed that the **top management team**, as well as the **senior management team**, should be **engaged in a similar Appreciative M&A team coaching programme** to enhance buy-in and work-related performance. **Individual executive coaching** is suggested as a complementary intervention for company leaders based on the demands that cross-cultural M&As place on these leaders' internal and external resources.

In the context of the HIV/AIDS pandemic in Swaziland, **wellness coaching** should be an integrated aspect of coaching for organisational performance. Lastly, **business coaches** who coach stakeholders in contexts of cross-cultural M&As are **invited to use this programme** as a frame of reference to facilitate these stakeholders' mental health for sustained performance.

#### **7.5.2 Business Coaching Education**

First and foremost, business coaches should **develop their capacity to embrace positive organisational change** through gaining experiential learning in the field of Appreciative Inquiry, with a specific focus on an integrated Appreciative M&A team coaching approach. This will facilitate transformation from dominant deficit oriented change management strategies to strength-based collaborative approaches in organisational settings where they are involved.

**Curricula** for business coaching certification and post-graduate studies should **include Appreciative Inquiry and team coaching** as collaborative approaches in change management, including managing M&A change as a specific organisational change phenomenon.

Business coaches should **engage themselves in continued personal and professional development processes**, such as obtaining accredited coaching qualifications, networking with other business coaches and coaching supervision to ensure credible practices and to enhance the credibility of the profession.

### 7.5.3 Business Coaching Research

It is proposed that the **scientific merit of the programme should be valued** through future qualitative and quantitative research, addressing the questions raised as part of the conclusions (7.4). Business coaching, including team coaching, and Appreciative Inquiry is relatively new strategies in the field of organisational development. This opens up vast opportunities for researchers to address areas of interest.

A crucial area of interest, identified through this research, is the **management of cross-cultural M&As through the use of positive organisational development approaches**. Further research is essential in the area of **intercultural learning**, and on **how to integrate employee wellness programmes in an organisational context infested by HIV/AIDS**.

Exploratory research regarding the **integration of African philosophy and Appreciative M&A team coaching** is needed to generate cultural congruent organisational change approaches. Research is also needed to explore the effectiveness of reflective approaches in a context of cultural diversity.

Finally, the use of **auto-ethnography as a research strategy to explore and describe how business coach researchers construct meaning in research** is further recommended. This recommendation is based on comparatively little published material regarding the use of this strategy in the context of business coaching.

### 7.6 SUMMARY

This Chapter aimed to provide justification regarding the original contribution that the research made to the scientific body of business coaching knowledge. It additionally addressed perceived limitations and practical challenges that I encountered during the research process. Recommendations were lastly made regarding business coaching practice, education and research. I do not claim that the research product presented in this thesis is the final word, nor that the methods followed were flawless, but I do believe that something worthwhile was achieved by conducting this research.

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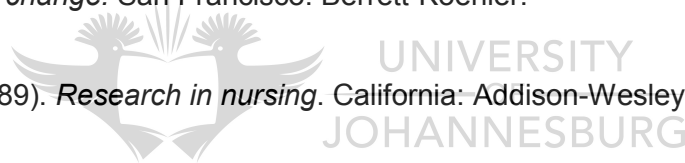
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# Appendix 1

## Ethical Clearance: Faculty Of Health Sciences Academic Ethics Committee





UNIVERSITY  
OF  
JOHANNESBURG

**FACULTY OF HEALTH SCIENCES  
ACADEMIC ETHICS COMMITTEE**

02 August 2006

**Clearance Reference Number: 32/06**

**TO WHOM IT MAY CONCERN**

**TITLE OF RESEARCH PROJECT: "A Merger and Acquisition Team Coaching Programme to facilitate the Mental Health of Managers for Sustainable Performance".**

**RESEARCHER: Visagie R G**

**SUPERVISOR: Prof M Poggenpoel**

The Committee for Academic Ethics of the Faculty of Health Sciences of the University of Johannesburg evaluated the research proposal and consent letters of the above research project and confirms that it complies with the approved Ethical Research Standards of University of Johannesburg.

The study supervisor and researcher demonstrated their intent to comply with approved Ethical Research Standards during conduct of the research project.

The following recommendations are made by the committee which will improve the quality of your proposal and render it fully ethically compliant.

- Consent/letters of request to be attached to the proposal
- Explain how validity and reliability will be established.

The changes must be re-submitted to the supervisor/s to their satisfaction.

On behalf of the committee, I would like to wish you luck with your studies.

Kind Regards

**Ms M H SEOLO  
FACULTY RESEARCH ADMINISTRATOR**

# Appendix 2

## Company Request For Consent To Participate In The Research





April 24, 2003

## REQUEST TO CONDUCT RESEARCH IN YOUR COMPANY

**Dear research partner**

I am Retha Visagie, a doctoral candidate at the University of Johannesburg, and I hereby request written consent to conduct research in your company entitled **“A Merger and Acquisition team coaching programme to facilitate the mental health of managers for sustained performance.”** The overall purpose of the research is to implement and evaluate the Merger and Acquisition (M&A) team coaching programme that I developed in partial fulfilment for the degree Magister Curationis. I ultimately aim to refine and validate the particular programme focusing on mental health facilitation as a prerequisite for sustainable performance during M&A change processes.

The proposed research developed against the backdrop of reports indicating mismanaged M&A implementation processes and the impact thereof on the mental health of relevant stakeholders. It is furthermore an extension of the abovementioned research endeavour resulting in an M&A team coaching programme that currently lacks validation.

I plan to conduct the research in three phases. The **first phase** will entail a situational analysis to ensure programme applicability. The **second phase** will involve programme implementation, evaluation and refinement. This phase will be implemented over a three-year period and will be characterised by the implementation of an M&A team coaching programme reflecting two distinct stages, namely an M&A orientation stage and a M&A implementation stage. The M&A orientation stage requires participation of the selected management team in a five-day orientation programme. The M&A implementation stage refers to monthly team coaching meetings at the Hotel in Swaziland. Each meeting will last for four hours and will focus on an outcome-based M&A team coaching intervention. **Stage three** refers to the

critical programme review component that will be conducted by academic and business partners in the field of coaching.

The management team will be involved in a focus group, naïve sketches, reflective practices, a qualitative interview and descriptive feedback tools as a way of collecting data to meet the research purpose. Document reviews will form part of the data analysis process. Research partners involved with the critical programme review in phase three will be requested to complete specific evaluation criteria that will be finalised during the research process.

I shall adhere to strict ethical guidelines throughout the course of the research. I understand that your company's participation in this research is voluntary. I undertake to safeguard your anonymity by omitting the use of individual and company names and places in the research report. Audio-tapes and other data sources will be kept in a secure place for a period of three years after the completion of this study for potential audit purposes.

The immediate benefit of the research to you as a company is to accelerate the personal and professional growth of this specific team and to sustain change initiatives. A long-term advantage is your role in the ultimate creation of a credible M&A team-coaching programme focusing on mental health facilitation in the work place.

I am aware that there may be certain risks inherent in this research, such as emotional discomfort experienced by the management team during the coaching process. In the event of this phenomenon, I shall address it by means of supportive interventions. No permanent risks are envisaged.

I shall provide you with a summary of the results and recommendations on conclusion of the research. I would like to thank you in advance for your participation in this research.

Should you agree, you hereby give consent to collaborate in the proposed research that will be supervised by my two study promoters, Prof. M Poggenpoel and Prof. CPH Myburgh.

Signed at.....this.....day of.....2003.

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Signature of research partner

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Signature of researcher, RG Visagie  
D. Cur (Psychiatric Nursing Science)

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M Poggenpoel (Study promoter)  
Professor: Psychiatric Nursing Science

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CPH Myburgh (Study promoter)  
Professor: Education Sciences



# Appendix 3

## Participant Request For Consent To Participate In The Research







April 24, 2006

## **INVITATION TO PARTICIPATE IN A RESEARCH PROJECT**

### **Dear prospective research partner**

I am Retha Visagie, a doctoral candidate at the University of Johannesburg, and I invite you to participate in my research project entitled "A Merger and Acquisition team coaching programme to facilitate the mental health of managers for sustained performance". If you decide to participate, your experience of the topic mentioned, is a requirement for reaching the overall purpose of this research, namely to implement and evaluate a Merger and Acquisition (M&A) team coaching programme in order to validate and refine the particular programme. The programme will focus on mental health facilitation as a prerequisite for sustained performance.

The proposed research developed against the backdrop of reports indicating mismanaged M&A implementation processes and the impact thereof on the mental health of relevant stakeholders. It is furthermore an extension of a previous research endeavour in which a team-coaching programme was developed as a way of facilitating M&A change in order to promote mental health. This programme currently lacks validation, hence the need to implement and evaluate the programme.

In order to validate and refine the programme I need to implement and evaluate it during monthly team coaching sessions with a selected team of research partners. I will conduct a focus group, naïve sketches, on site observations, document reviews, reflective practices, qualitative interviews and descriptive feedback tools as a way of gathering data to meet the research purpose. Focus groups and qualitative interviews will run for approximately 60 minutes and will be audiotaped for the verifications of findings by an independent research expert. Research partners involved with the critical programme review phase will be

requested to complete specific evaluation criteria that will be finalised during the research process.

Strict ethical guidelines will be adhered to throughout the data collection and analysis process. Your participation is voluntary. You have the right to withdraw, without any prejudice at any stage of the research, should you wish to do so. I undertake to safeguard your anonymity, as well as the anonymity of the Target Company, by omitting the use of names and places in the research report. Confidentiality will be assured by erasure of audio-taped material on the completion of transcribing the tapes. Member checking of written reports will be conducted before dissemination to the Target Company as an additional measure to ensure confidentiality.

The immediate benefit of the research to you is the opportunity to participate in monthly team coaching sessions that aim to accelerate your personal and professional growth and unleash your true potential to deal with M&A activities in a constructive fashion. A long-term advantage is the fact that you are a co-creator in designing an M&A team coaching programme that aim to facilitate the mental health of managers for sustained performance.

I am aware that there may be certain risks inherent in this project, such as emotional discomfort during the coaching process. In the event that you experience emotional discomfort, I shall attend to it by means of supportive interventions. No permanent risks are envisaged.

I would like to thank you in advance for participating in this research and for using your time to share your expert experiences and knowledge in order to improve the field of mental health, coaching and the hospitality industry.

A summary of results will be presented to you as a team on conclusion of the project.

Should you agree, you hereby give consent to participate in the proposed research that will be supervised by my two study promoters, Prof. M Poggenpoel and Prof. CPH Myburgh.

Signed at.....this.....day of.....2006.

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Signature of research partner

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Signature of researcher  
Retha Visagie  
D. Cur (Psychiatric Nursing Science)

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M. Poggenpoel (Study promoter)  
Professor: Psychiatric Nursing Science

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CPH Myburgh (Study promoter)  
Professor: Education Sciences

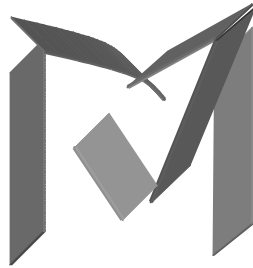


# Appendix 4

## Transcriber Request For Consent To Participate In The Research And Confidentiality Contract



Leatitia Pelser  
083 236 4536  
leatitia@ananzi.co.za



PO Box 8431  
Halfway House  
1685

## Mirage Visions

*Capturing moments – Making memories*

### **CONFIDENTIALITY AGREEMENT**

#### CONFIDENTIALITY AGREEMENT WITH REGARDS TO THE TRANSCRIPTION OF AUDIO RECORDINGS

1. I understand that all material received for the purposes of the transcribing audio taped records of the interviews with participants in the study are personal and confidential.
2. I understand that the identity of participants as well as the content of the interviews must be kept confidential and may not be revealed unless according to the protocol for the study.
3. I undertake herewith to treat all material received and content to which I have access with appropriate professional confidentiality, ensuring this by storing all copied material securely and by returning all copies back to the investigator after completion of the transcription.
4. I provide informed consent to participate in this research through compiling transcriber reflections after each individual qualitative interview.

NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

PLACE: \_\_\_\_\_

WITNESS: \_\_\_\_\_

# **Appendix 5**

## **Phase One: Samples Of Multiple Data Collected During The Situational Analysis**

### **Appendix 5.1**

**Completed naïve sketches**



### **Appendix 5.2**

**Focus group transcript**

### **Appendix 5.3**

**Field notes**

# Appendix 5.1

## Completed naïve sketches



## DEAR CO-RESEARCHER

WRITE A NAÏVE SKETCH ANSWERING THE FOLLOWING TWO (2) QUESTIONS:

### 1) WHAT WAS YOUR EXPERIENCE OF ALL THE CHANGES SO FAR IN THE COMPANY?

- STAFF WAS ANXIOUS DUE TO INFO RECEIVED FROM THE PREVIOUS COMPANY. THE OLD COMPANY DID NOT WANT TO LOSE THE CONTRACT AND THEREFORE TRIED TO SCARE THE STAFF AWAY FROM THE NEW COMPANY.
- MOST STAFF <sup>WERE</sup> POSITIVE DUE TO ASSURENCES GIVEN BY THE NEW COMPANY AND THE INCREASES AGREED TO.
- THE PREVIOUS COMPANY WAS VERY AUTOCRATIC, AND SOME OF THE MANAGEMENT WAS DEGRADING AND OFTEN HUMILIATED STAFF SO IT WAS EASY WITH A POSITIVE TO ACCURE THEIR COMMITMENT. BY TREATING THEM WITH RESPECT AND ENPOWERY THEM TO MAKE DECISIONS THAT AFFECTS THEIR WORK. THIS WAS SEEN AS A POSITIVE CHANGE AND MOST STAFF WERE THEREAFTER CONVINCED THAT THE CHANGE WAS FOR THE BETTER.
- ALTHOUGH THE WORK <sup>ENVIRONMENT</sup> ~~WAS THE SAME~~ STAYED THE SAME THE QUALITY OF THE WORK IMPROVED. ALL PROBLEM AREAS WERE ADDRESSED AND SOLUTIONS WERE IDENTIFIED. THE SOLUTIONS WERE DISCUSSED WITH THE STAFF AND AGREEMENT ON THE SOLUTIONS WERE ACCIEVED. THE STAFF WERE MORE COMMITTED AFTERWARDS BECAUSE HE WAS CONSULTED AND HAD INPUT IN THE PROSES AND UNDERSTOOD WHAT WAS EXPECTED.



## 2) WHAT RECOMMENDATIONS DO YOU HAVE TO ADDRESS CHALLENGES RELATED TO THE CHANGE PROCESS?

- ~~Treat~~ Respect towards staff / fellow workers
  - NO RASISM
  - NO DO NOT TREAT THEM AS if they are stupid
  - RESPECT THEIR VIEWS <sup>openly</sup>
  - Offer them the ~~change~~ to do their jobs with dignity and pride by assisting and guidance.
- Communication
  - TRY TO STOP RUMOURS
  - GIVE accurate information
  - DO NOT MAKE promises that you might NOT BE ABLE TO KEEP
  - MAKE SURE THAT information is understood and correctly interpreted.
- INTER HUMAN Relationships
  - Care about their problems
  - MAKE it fun to work <sup>(Humour)</sup> ENVIRONMENT
  - LOOK AFTER THEIR WORK INVOLVEMENT, mental and physical wellbeing.
- LEADERSHIP
  - MAKE sure that the leader is respected
  - BE fair
  - BE specific in praise and reprimand
  - Empower middle management immediately
- Growth and stability
  - Training
  - Visible change
  - Empowerment
  - Direction of the company
  - Assurance that if they perform their duties that they will always have a job and that they will be developed to do their duties better and that they can grow and be promoted in their fields.

## DEAR CO-RESEARCHER

WRITE A NAÏVE SKETCH ANSWERING THE FOLLOWING TWO (2) QUESTIONS:

1) WHAT WAS YOUR EXPERIENCE OF ALL THE CHANGES SO FAR IN THE COMPANY?

No many things were said which made me to think if they she will last to the new company e.g

a) It was said that the company will retrench about 30 staff members.

b) It was said that they shall be bring about 6 new heads of department to run the hotel with the new G. Manager.

c) An advert was on local news papers ~~the~~ looking for certain people to take over certain positions

d) The reputation of the new company was not known in the hotel industry, resulting in having doubts about their future.

e) The staff / outgoing management were not willing to go, they started to pretend as if they were better off looking the staff better than the new company

## 2) WHAT RECOMMENDATIONS DO YOU HAVE TO ADDRESS CHALLENGES RELATED TO THE CHANGE PROCESS?

1. The new company needs to be very open like the previous GM. He is very open that brings hope that was no longer there when they took over.
2. People need to be trained especially to the standards of the new company.
3. People need to be thanked for the jobs they are doing as much as they are paid for the jobs they are doing. It does a motivation.
4. Remember that every body is very important from top to bottom in their respective jobs they are doing.



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## DEAR CO-RESEARCHER

WRITE A NAÏVE SKETCH ANSWERING THE FOLLOWING TWO (2) QUESTIONS:

### 1) WHAT WAS YOUR EXPERIENCE OF ALL THE CHANGES SO FAR IN THE COMPANY?

The changes had lots of both Negative & Positive Experience.

Negative:

Job instability - Though at leasing stage the Government had assured all that they will retain their jobs even though the government had to pay all the employees for the services that had been rendered in the years.

It was felt that government had not done enough to investigate the company to ascertain its base on a positive note.

At negotiation level, it transpired that there were some disagreements over some certain industrial relations clauses which the staff felt they should engage the services of a lawyer. There was mounting pressure as the outgoing company was moving around painting the newly appointed taking over company, belittling them in the operation indicating that they will fail and thus the government would look back and reconsider. Then you can imagine all these seeds when they are sown what they do to human life. The fact that the company was doing well in its last few months, they did not take it kindly that they should leave the operation. The staff was divided to break of communications.

## Positive:

Even though things had been speculated of any sort about Government, New Company outgoing company and the staff, the bottom line was that the change is coming.

Promises that the new company was determined to train and empower the staff.

Staff were happy that they would get the layoff packages and still retain employment with current benefits.



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## 2) WHAT RECOMMENDATIONS DO YOU HAVE TO ADDRESS CHALLENGES RELATED TO THE CHANGE PROCESS?

Recommendations would be a clear line of communication involving all the parties that would be affected by the move.

Encouragement to all involved that when we grow, let us grow together and work toward one common goal.

Leadership must not fall in line with the line staff in terms of information so that they have answers for what ever and be able to clear the air in the event of dark clouds.



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# Appendix 5.2

## Focus group transcript



## FOCUS GROUP 1

### PROGRAMME APPLICABILITY

<u>Speaker</u>	<u>Dialogue</u>
Interviewer 2	<p>Thank you for your willingness to participate in this research. Okay. The first thing that we will guarantee, what we are going to guarantee in the letter, is your anonymity. We are not going to use names; we are not going to use names like the institution...people (inaudible) like that, okay. And the other one is that whatever we do here will be confidential. It is talk within these walls, okay. And the only people who will have access to this tapes is the two professors, Prof. Marie and Prof. Chris and the next person will be an independent coder, meaning that after we have done the transcribing of the material, then the person can look at what themes, what we call themes in this stage, what themes are there in these tapes. So after we have finished with these tapes they will be destroyed. We don't keep them forever. Okay. The other thing that we want to indicate to you is that we are not forcing you to do this. If you would like to go you can tell us that you would like to go. That is very important. So there must not be pressure. You are under no obligation and we will not force you to go on in this research. And when you decide that you want to pull out from this research project, you are allowed to do that. What we are doing is that we want to evaluate this programme that Retha has done so that you can also implement it in other companies (inaudible).</p>
Interviewer 1	<p>Can each one just state your name and then say that you are willingly here and that you want to be part of this.</p>
Interviewer 2	<p>I will give you an example of how you should do it. You should say, I, X, agree to participate in this. Remember, J, what I am saying is (inaudible) about anonymity but since we don't have the letters now at this stage, we have to get consent with you saying that. When we transcribe, when we write the proper thing in this little book, we do not use names.</p>
Interviewer 1	<p>And it is not a little book, it is a helluva book.</p>



Interviewer 2	It is one big book like this one.
Interviewer 1	Your stories will be in this book. In a similar book.
Interviewer 2	In a similar book.
Interviewer 1	And you will have access to the book if you want to read the book.
Interviewer 2	We will tell you about the results also. That is one of your rights; that you can know what is happening and we will also do individual member checking. To check with you if you agree with us about what we have written. So that one day when you read the book, you mustn't say, you came through from South Africa to come to lie to us. We will do what we call member checking. So one time we will have another meeting like this and show our appreciation again and check with you the stuff that we have done.
Interviewer 1	<p>And we will be with you for the rest of the year. So we can do it continuously also. Okay. So I wonder who would like to start? To just maybe tell us that you are willing to participate. Thank you, P.</p> <p>[Members adhered to this request and provided verbal informed consent for research participation]. We have invited you to join in this focus group today for a specific reason. Your invitation has been based on certain criteria and the criteria for your invitation is that you have all been exposed to the change process in this hotel. Maybe even if you weren't here from the start, you have heard stories and that means that you are valuable to us. What is going to happen today is; we are going to tape record your specific experiences of the change process and we will have two central questions that we will ask you. We will handle one at a time. The first question will be: "What was similar about the change process in this setting?" We will give you a card with the question to keep in front of you so that you can be focussed the whole time. So that we stay with the topic of what was similar to you. Then there is going to be a next question and that will be: "What was different about the change process for you?" And the reason that we are here today is that we want to somehow capture your stories of the change process. We cannot implement the programme based on previous research without confirming the transferability of that research in this setting also. And we are just</p>

	<p>going to bounce some ideas. There is no right or wrong answers. As I have said, it is just about including as many voices as possible. So I want to invite all of you to please share your stories and your ideas with us and we are interested not only in positive stories but also in negative stories because all the stories will give us a picture of your experience today. And our roles as researchers are, number one, we have the very important role of listening to these stories. We have the important role of capturing the data. That is why we have the tape recorder so that we won't lose the valuable things that are shared today. And as researchers we will make constant notes about things that you say or everything that happens in the room. And also we will assist you in including your voices. That means that maybe at times as the researcher I will stop you and I will tell you, 'let us focus on the question again'. When I do that, I want to apologise and tell you that I am not disrespectful. It is just that we need to focus on the questions. And not to drift away. I think I am just going to maybe share with you, just to refresh your memory the name, oh, I can't put it on, all right. So you can remember the picture, if we talk about the questions, keep in mind and think back on your own experiences and the things that I have shared this morning with you. That in the previous setting there was dark stories, there was also stories of growth, there was stories that was different and told us almost different pictures of the same process and they shared some recommendations. So my first question to you that I am going to send around then is; "What was similar about the change process in this setting for you?"</p>
Interviewer 2	And for the purpose of us using these tapes please just speak up so that we will be able to hear more eligibly.
Interviewer 1	And one at a time if possible. The first question then is; "What was similar about the change process in this setting?"
Unknown Participant	When you say similar, are we making comparisons to the past (inaudible)?
Interviewer 1	We are comparing current with past. You are also comparing your story of change with his story. But when you tell the story, just start from your side but thinking about what you have heard about change.

	<p>Maybe if we can focus, if we can ask, tell us about the dark stories. What was for you similar regarding the dark stories? And the dark stories was the stories of uncertainty, it was the stories of trauma for those people.</p>
Unknown Participant	<p>As you all know, I have actually started when the company actually took over and as I said previously, it was not a (inaudible) hand over from the (inaudible). We, you know, I have been to quite a lot of places where they tried to hinder the new company in performing their duties. And basically it was myself and the general manager that was on one side and the staff was still reporting to the old management. So we did not have the power to stop those processes but it was very frustrating trying to correct the deliberate faults they made on their side to hinder us in our process as well as to find time to do the whole changeover process. So we were doing crisis management and damage, I can almost say prevention, as well as planning in the first few days that we were here. And that was very frustrating from our side so I assume the staff was in the same process of where they got conflicting messages. Where the new management that will be coming in, in a day or two or three, will, they can't really give an instruction but will request something and then we assume that from the old management they would (inaudible) this instruction to make it for us difficult. Or it seemed, from my perspective, it seemed that way. So yes, it was a bit difficult in the first few days until we could take over the reins and start (inaudible).</p>
Interviewer 1	<p>He is talking about damage control and conflicting messages. Who in this room also experienced that?</p>
Unknown Participant	<p>I would say he is quite right on that perspective. I must say I earnestly started dealing with the incoming company three or four months prior to the takeover like the intermediate person. Criticism from all angles. I would hear this side of the outgoing management and I would hear this side of the incoming management. They needed some few things which, you know, they had to get other than going through the channels of government and so on and so on. And considering the fact that the outgoing company's financial muscle on the last few</p>

	<p>months was actually gaining momentum, this people had a little bit of resistance in, you know, going out and citing some failures, negativity about incoming company and which made, you know, the people who have the answer (inaudible) to what is actually coming and we were once faced with a situation where, I never thought that the company – incoming company – was going to indeed take over because of delayed factors. All the parties involved, be it you know, the owners of the property, the outgoing management, the incoming management, these agreements had not been signed so the people were in limbo. Maybe a period of a week or so, the people who will okay the staff (inaudible) did not wait for anybody, they were just working (inaudible). So as he indicated, we need to talk to you and you know, it was a lot of things that was, you know, brewing (inaudible). The staff was not sure exactly what is actually happening. Unions are putting a side onto a different perspective. We wanted a common ground on how to address the situation, yes and likewise, just (inaudible). The pleasure of waking up in the morning, going to work, you have to face the challenges of the new day. You have to build up the situation moment by moment. The moment the situation is getting built up, that is the trust as well as getting it built up, at the same time the base line never forgets to go back and check some few technicalities that were negatively (inaudible). As you go along you will check the validity to see if it does not collide with, you know, the positive act. So that is the trauma that we have been actually faced (inaudible). It is actually getting over now because of some other individuals (inaudible) the industry. Some people have nowhere to go. Some people who are just excited at getting a package and then whatever happens, if I am being pushed out then the situation will decide itself. So you are finding, you know, all of those things, which are (inaudible) the normal situation.</p>
Interviewer 1	<p>You have just reflected on the pre-take over situation and I have heard a lot of uncertainty there. You mentioned some challenges but I wonder, the rest of you, what challenges did you face in the pre-acquisition stage?</p>

<p>Unknown Participant</p>	<p>(Inaudible) explains a lot of problems I would say, if you look at what he just said (inaudible). I think facing...I have been dealing with the upper management, you see, and again dealing with the staff behind me because they want to find out really what was happening in front, you see. So for me it was a bit of a problem to talk about the ongoing company. Then it was for me now, to look at what we have got in conjunction with what we are going to have, you see. So what I discovered during the pre-takeover, there were things that were being said (inaudible) you see, by the outgoing managers and it was important to us now to know which way to go. Because we know for a fact that we were not doing okay on the outgoing company. So and that was in August, all of us, but people couldn't know what was going wrong. So for us now was to be in a situation where, while the outgoing company was (inaudible) yet they have never seen all your (inaudible), the (inaudible) was to get a proper knowledge for (inaudible) to the staff and again the staff (inaudible), what was happening during the time of (inaudible). So there was a time where we were even, when the takeover was due, when I have seen that it was critical for me to have (inaudible). I was told to prepare for X to take over from Q, so I was given a mandate to prepare staff. That was personally, to take me through to X, so I was told by the outgoing management that I am not allowed to do that. Yet it was said before and it was even hard for me now to know what to do because I was, I could not get hold of the management by that time so it was a stop order by the outgoing management. Yet I know that I am going to suffer on the other side of the story. So I suffered (inaudible) because I had no (inaudible) yet I was told to do this talk that they do, the HR do and everything was just a misunderstanding. I could not know what to do because I had to get solutions but where to get it, nowhere.</p>
<p>Interviewer 1</p>	<p>I pick up from both of them and also from J's contribution that there was a sense of isolation in terms of where to go.</p>
<p>Interviewer 2</p>	<p>Yes.</p>
<p>Interviewer 1</p>	<p>I wonder if someone else also experienced that; that sense of isolation?</p>

<p>Unknown Participant</p>	<p>It was, because you know, at a point when it started when it was said that you know such and such (inaudible). At the time, you know, everybody wasn't quite too sure if (inaudible). There was this, you know, list to all of us to say what is going to happen at the end of it all, you know, because (inaudible). Also for the fact that, you know, the outgoing, you know, management was not like, they were sort of like not wanting to go. (Inaudible) you know, they are good for the staff and for the department and this (inaudible) and then there was this question, you know, from amongst us, you know, that to say but, you know, all along these people they (inaudible) say they are not making money, (inaudible) now. They want to stay, okay, why, you know. And how can you judge the incoming, you know, management, you know, if they are good or not from what they are saying, you know. It was (inaudible). Like R says, okay, it was (inaudible) for even the (inaudible) that you have because they were saying on the other hand, (inaudible) order suddenly stop or nothing (inaudible) instead of by the end of the month there should be nothing. Then we are saying to ourselves, why, because at the end of the day, the new company will buy or whatever, that is that, okay. So now, now that we have got customers in front of us, customers that will need a service from you and what do you say to these customers? They don't know about this politics, which are taking place amongst the two companies. They want a service (inaudible). It was very difficult.</p>
<p>Interviewer 1</p>	<p>The effect on the way that you could serve the clients – can you maybe tell us more about that? That difficulties?</p>
<p>Unknown Participant</p>	<p>We were, my personal feeling was that they were trying to set us up to fail. They wanted us to fail so they could turn around and say, you see what happened, you gave it away and you know, trying to... Well, after everything happened, there was nothing you could have changed but just to get the last blow in to say look, your (inaudible) were actually wrong, check (inaudible) and they set us up to fail. Which didn't happen and we have not heard anything from them since. They, I think we (inaudible) thinking and trying to say, well ja, it is not going to be (inaudible) so we are always wrong. It was (inaudible) before we</p>

	<p>took over type of thing. (Inaudible). So, yes, it was difficult because it was still not our hotel but we had to make decisions to (inaudible) and we can't, we couldn't consult with the staff so it must have been very confusing. You know, the one side saying, almost with secrecy and so, yes, there were a lot of politics, which I think was unnecessary.</p>
<p>Unknown Participant</p>	<p>And yet, you know, there are a lot of things that are similar, you know, from what we are hearing about the other people. The only difficult thing was what they are talking about, because this people are not willing to leave, you know, so they were making things difficult for us but the other difficult thing was trying to convince the staff, you know. I can manage change, you know, and challenges, you know, but then they were coming to me all the time and say what is that, what is this, you know. But trying to convince them that maybe it is for the better was very difficult. But we tried, you know, like we tell them, no, let's wait and see, you know, because we are like told that they are not going to be retrenching anybody. They are taking all of us in. But people were not sure if that is going to work, if that is going to happen. I was not sure. Especially when I started looking at the paper and I saw Admin in the paper for positions, then I thought if they want, you know, such a position then it means I am going away, you know. If they want somebody for F&amp;B then it means E is going away. We were, you know, (inaudible) but we tried to be strong and be on the positive side.</p>
<p>Unknown Participant</p>	<p>We can see a lot of resistance and it was actually (inaudible) in the situation in terms of the outgoing people pulling a different way like it would be a nice thing, the people involved in the operation, the staff, do have a very, very big muscle to say no, but all what we have been saying is; the decision that the company has taken, it is not going to reverse. If it means on the 30, on the signed date, the outgoing company is going then (inaudible) will be in place. We don't see the people staying over because they are in a period of winding up has been (inaudible) to the best of the contracts ability so people must not be shaken about them wanting to stay then they, you know, monitor what the festive season is going to do, and so on and so on and again,</p>

the people in fact were actually involved in lots of stresses. In terms of service, in terms of doing this, that and that, the people were just thinking; we are human beings, we are subject to those things, whatever happens or now these guys would want to check me out (inaudible) before, you know, had even gone into a stage whereby we said because of the uncertainty of what is happening, any person between the time when the government has announced that, within this timeframe company B is taking over, those people even if they decide to leave should be included in the package, even if they leave prior before the actual time happens, to try and secure all the ideas you hear and subsequently somebody, because you don't side with me, you side with the unknown incoming person and you decide that you should cease my services. Better this person be secured to get ease of her duties. So all these things, in fact it started many years ago when the place was known as a white elephant and in five years after its first operation it was indicated it will be closed. The people around the table and all the people who were actually working so it is the difficult one of they needed to do things like long-term goals with the bankers. And if the bankers you come and say you are working for company A, they just tell you we don't guarantee the current situation so we cannot give you something extended for that time. Sometimes you would go to the bank and find that it is month end, there is nothing. How much does this destroy you? It is one indication and you are doing some rations to go and get some pensions with the government to try and help the situation. You know, it was a lot of hectic situation. So it started way back before the actual time of announcing who is taking over. So the time when we knew somebody was coming to take over, it was going to sound like a bit of (inaudible) but (inaudible) that A is going, B is coming. But A started destroying B before B could come in and B was not aware, we were even told there is a list that is held by B of targets, of people who are supposed to be thrown out of the operation. Tell me what are the feelings of the people who feel that A has hated B ever since? Now the very same A is telling you that B is in possession of the list of people who are dormant who need to be got



	rid of. So you are just jerking yourself and you want, and each time B talks to you, anything that B decides you say B is acting on instructions from A.
Interviewer 1	So there was a lot of mistrust.
Unknown Participant	A lot.
Interviewer 1	A lot of mistrust. And (inaudible), I am interested, you talked about that many things were similar. And I wonder if you can maybe explain to us what was similar from your point of view?
Interviewer 2	I mean, I am talking about the dark stories and mistrust.



# Appendix 5.3

## Field notes



15. 2. 03 1st Contact : Process notes

The GM introduced us to the team. Six members present. They appear anxious & state: "...hope we say the same things..."  
"I was biting my nails the whole afternoon."

Annie - "I want to thank you for allowing us in your world..."

Lot of uncertainty reflected in team's comments: "Try to find out their (acquirer's) expectations... like a tortoise... we definitely don't know what the outcomes will be..."

"uncertainties... mistrust here and there"

One member's hands are shaking - "needs to prove yourself constantly"  
"defenses here and there"

History of M & A challenges unfold. Hotel Government owned. lots of consultation prior to take over - "lots of promises made". Currently 3 months probation period - close to 90 people's employed.  
"These people have fears" - externalising language.

Process/dynamics: Female member does not participate verbally. Smiles. Two members clearly anxious - moving around, hands shake... One member use "intellectualising" as defense. Anger displayed by one member. Harmonizer (T).

## Methodological notes: Field worker

### Mental Preparation

Questions that should pass through the moderator's mind while the discussion is in process.

- What else do I need to ask to understand the problem and answer the objectives of the research?
- How much time do I have left? Will I be able to cover everything when just one section of the topic guide could take the full two hours?
- What does all this mean anyway? What am I hearing about participant's feelings, beliefs and behaviour? What ideas does this suggest about solving the particular problems?
- How do I get beyond the intellectualizing to respondents' real feelings? I want to reach the level of unanalyzed impressions and emotions - what goes through people's minds before it becomes censored. The issue is "What do you feel?" not "What is your opinion."

RECORD WORK

# **Appendix 6**

**Phase Two: Samples Of Multiple Data Collected During The M&A  
Orientation Intervention**

## **Appendix 6.1**

**Completed naïve sketches**



## **Appendix 6.2**

**Field notes**

# Appendix 6.1

## Completed naïve sketches



# FEEDBACK: INDUCTION PROGRAMME

Date: 2003-03-10

We value your feedback. Please share your experience of the induction programme with us. Suggestions/recommendations are welcome.

*"The greater the vision, the greater the need for others to make it reality!"*

Jim Dornan

1) The best part of this day was... WHEN MR. SHARBA

HIS EXPERIENCE PARTICULARLY AS TO HOW HE WENT INTO THE HOTEL INDUSTRY, INSIGHT INTO THE NECESSARY EXPERIENCE OF RUNNING THE HOTEL AND ALSO

WHEN THEY WENT THROUGH THE HARSHNESS OF MANAGEMENT CHANGES ALSO PARTICULARLY WHEN THE SWISS COMPANY TOOK OVER.

2) The least enjoyable part of this day was.....

I ENJOYED EVERYTHING, EVERY POINT WAS MOTIVATING, CHALLENGING AND HEARING TO UNDERSTAND OTHER PEOPLE'S VIEWS.

3) For future team coaching sessions I need

1. Exposure to understand more on accounting (F.d & partners)
2. Exposure to front office work.

4) Comments. It has been encouraging to hear from the CEO that if you want to achieve anything in life nothing is impossible if you plan correctly. If you have no goals, if you seek to empower yourself without being pursued.



## FEEDBACK: INDUCTION PROGRAMME

Date: 2003/3/11

We value your feedback. Please share your experience of the induction programme with us. Suggestions/recommendations are welcome.

*"The greater the vision, the greater the need for others to make it reality!"*

Jim Dornan

1) The best part of this day was... This is when we were talking about people as if they were not here. This enabled us to know each other better. It was fantastic.

2) The least enjoyable part of this day was... The last part of the question done in groups it was a bit difficult for me but the little that I said was not too far from the real thing.

3) For future team coaching sessions I need.....

4) Comments.....

This is a good exercise  
It opens eyes on things that  
you were not aware about  
ourselves and you were not aware  
that people know you so well.

What is one thing that I can do differently  
in my role as <sup>a</sup> team coach next time.  
nothing.

# Appendix 6.2

## Field notes



## Observational notes

13.3.2003 Fire drill exercise +

### Appreciation activity

Question posed to team after session:

How do you connect all this to your team?

" People care more about others than themselves... "

" We are different, bringing different attributes. "

What was your experience of writing the message of appreciation?

" Easier to write than to say. "

" Speaking from the heart "

" You can speak - I know myself and others better than before. "

" It is difficult to put into a few words what you feel... It was a bit of a struggle. "

" Everything was centered on what we were doing. "

" Easier to write on people that you know. "

" Being robbed of the opportunity to write as much as you want. It's been nice. You look at each and every individual to explore them in a new way. "

Experience of feedback? It's amazing what other people think about you... somethings lock you into a corner where you need to prove that you can still lead the life in the same statements

# **Appendix 7**

**Phase Two: Samples of Multiple Data Collected During The M&A  
Implementation Intervention**

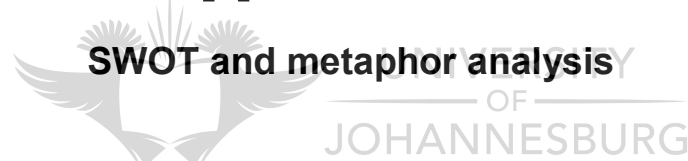
## **Appendix 7.1**

**Descriptive feedback sheets**

## **Appendix 7.2**

**Reflective letters**

## **Appendix 7.3**



## **Appendix 7.4**

**Field notes (retrospective, auto-ethnographic & observational)**

## **Appendix 7.5**

**Coaching logging report**

## **Appendix 7.6**

**Qualitative individual interview transcript**

## **Appendix 7.7**

**Transcriber reflections**

# Appendix 7.1

## Descriptive feedback sheets



**FEEDBACK: LUKHWETI TEAM**

**17 MAY 2003**

We value your feedback. Please be so kind and share your experience of the team coaching with us. Any suggestions or recommendations are welcome.

"The greater the vision, the greater the need for others to make it reality!"

Jim Dornan

**1. WHAT HAVE YOU FIND MEANINGFUL IN THIS TEAM COACHING SESSION?**

Negotiation was very meaningful to me b'cos I discovered that it is the best way of managing conflict in the workplace.

**2. HOW WILL YOU USE WHAT YOU HAVE EXPERIENCED TO BETTER YOUR PERFORMANCE IN YOUR WORKING ENVIRONMENT? PLEASE TRY TO BE SPECIFIC.**

I will try and better any ways of managing conflict by trying to understand more why maybe the staff member is doing what he has done like maybe have more time (counselling) with the staff.

**3. WHAT CAN THE TEAM COACHES DO DIFFERENTLY TO ADD VALUE TO TEAM COACHING SESSIONS IN FUTURE?**

Maybe if they can communicate more with us so that we do not forget what was done the last time to keep us on our toes.

4. ANY OTHER COMMENTS?

This is a good thing to do (Team Coaching)  
It reeves us and ticks our brains we  
do not rust & we have to keep it up,  
it boost our morales.

**THANK YOU FOR COMPLETING THIS FEEDBACK FORM. FEEDBACK WILL BE USED TO  
CONTINUOUSLY EVALUATE AND EXPAND ON THE QUALITY OF TEAM COACHING SESSIONS  
WITH THE LUKHWETI TEAM!**



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NAME: \_\_\_\_\_

DATE: 22-05-2004

**CLEARLY INDICATE WHAT YOU ARE GOING TO STOP, START AND CONTINUE TO DO, ON AN INDIVIDUAL LEVEL, BASED TODAY'S TEAM COACHING:**

▣ **SELF-EVALUATION: STOP, START, CONTINUE**

I will stop worrying and continue  
with my positive thinking and  
making use of the resources that  
I have for more production.

I am going to start scheduling  
my meetings so that there is  
continuous communication with my  
team, to use my diary more effectively,

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**WHAT DO YOU THINK THE TEAM SHOULD STOP,  
START AND CONTINUE TO DO?**

The team should stop  
meeting only when there is  
a team building session but  
should start meeting even  
before and after so that we  
can help each other and if  
there is a problem maybe  
collectively ask our coaches for  
advice.

The team should continue with  
the spirit they have at the  
moment.

# WORKSHOP EVALUATION FORM

We value your feedback. Please share your experience of this workshop with us.  
Recommendations are most welcome.

1) What have you learned about yourself in today's team coaching session?

- REALIZED WHAT THE IMPORTANCE of emotions play in our lives.
- I had to reflect on my life and the last year's events and I feel it is necessary to reflect on the past.

2) What have you learned about your team in today's team coaching session?

- That we ~~also~~ normally experience the same emotions during certain events.

3) How do you plan to implement what you have learned in your workplace?

- I will try to improve my EQ score and in doing that will improve the quantity of my work, personal life and my relationship with others.

4) What can we do differently in our roles as team coaches in future?

*Nothing. Everything is going well  
and it seems as if most members  
are happy with the progress.*



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# Appendix 7.2

## Reflective letters



**REFLECTIVE LETTER**  
**Re:**  
**SESSION 16: LUKWETHI TEAM (16 April 2005)**

April 17, 2005

Dear Lukwethi team colleagues

Saturday's "great service" game kicked-off a few minutes late. Nothing could however stop the Lukwethi team to play the game until the end!

The team coaches proposed a re-entry (fresh start) of all players into the game, not disregarding the past but rather utilizing lessons learned and moving forward to achieve results in a spirit of unity ("Together Everyone Achieves More"). Symbolically of this new start was also the newly agreed upon coaching days.

Players played with a ball focusing on "feedback in practice". Scoring goals in the session was linked to the quantity and quality of disclosure/feedback during the game. The notion that "even harsh feedback helps to measure progress and improvements" was the point of entry. Ultimately however feedback performance would be measured against implementation of constructive feedback behavior (one-on-one, in team context, verbal, written, etc.) in order to score goals in revenue and service excellence (business key drivers) on a continuous basis.

Rules of feedback when playing the "great service" game were determined as:

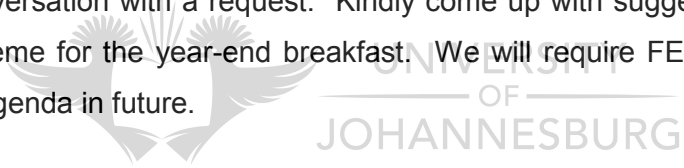
- Behavior indicating "commitment" on different levels, namely to take responsibility, to train departmental players, to supervise, check and follow-up
- "Team going in one direction"
- "Pro-active" behavior – to improve standards and to decrease guest complaints
- An attitude of friendliness (with external customers, but also with each other)
- Asking for input ("don't finalize the function without my input")
- "to talk" with appropriate person at the appropriate time

Values of honesty and integrity stood out when the feedback ball is in a player's possession. Also to take responsibility for playing the game. Ownership seems to be about catching and passing the ball even though it may create discomfort!

Changing weather patterns challenged players at times. Warm conditions were interceded by a heat wave at specific points in the game. The players bravely continued playing even in these harsh temperatures. Coaches noted that ball possession was not evenly distributed throughout the game. A “we” (“our department”) versus “they” (“other departments”) mentality also emerged at times. On the one hand the feedback ball was played based on brutal personal truths, on the other hand simple truths emerged (“I’ve started with [housekeeping department].” From the field the coaches observed movement in terms of the players levels of awareness. It also seems from a coaching perspective as if the team has a sense of direction in terms of how to deal with identified feedback challenges (proposed actions). Is this a valid assumption?

In our last letter to you, we mentioned that problem-resolution and growth, or resistance and stuckness, may be consequences of confronted issues that create discomfort. We are still curious as to where you see yourself (personally and as a team) currently on the playing field (growing or resisting)? We are wondering how you as a team would benefit from honest feedback practices? Lastly, have we scored any feedback goals during this session?

We end off this conversation with a request. Kindly come up with suggestions regarding the team logo and a theme for the year-end breakfast. We will require FEEDBACK in order to remove it from the agenda in future.



Lastly, what are you going to stop doing based on yesterday’s game?

Yours in coaching,

Retha & Jeanette

*PS. When we wrote this reflective letter it struck us that generosity and recognition (taking time and effort to share thoughts and experiences with others; acknowledging efforts) also underpin giving and receiving feedback. This may ultimately enhance productivity! May you have the courage to embark on the journey of constructive feedback with a spirit of generosity! Remember to communicate cleanly by taking responsibility for how you are heard, not just what you say!*

**REFLECTIVE LETTER**  
**Re:**  
**SESSION 16: LUKWETHI TEAM (16 April 2005)**

April 22, 2005

Dear Retha and Jeanette

Thank you for the reflective letter we analysed it with very great concern and what struck the most was your coming back a day after we had met. The team has asked that we do a collective feedback as a team and the unfortunate part is that M, N and C are not in and we will be very please if they could also forward their feedback.

Present in this feedback report are (six members of the team)\*

We must say that it was encouraging to have this kind of session where the first remarks by the team coachers were "Fresh Start". That alone had a lot in it as a team. We were really looking forward to some fresh things which indeed we had.

It was exiting after a long time of request when the team coachers broke the news that from the next team coaching, it will be held on the morning of a Friday to be chosen starting at 08:00hrs. This brought a spirit of motivation and so on.

We went to saying things that consolidate (tic) us to the team coaching. All the members had to say something and it was interesting what came out from there. One thing nice about everything is all based on constructive criticism. Players played the ball and passing on to teammates and the practice went on and on until the concept of being a team was grasped and a way forward was formulated.

Very important topics were covered in this session i.e.

Great Service

This was explained as a team of people pulling the same direction towards achieving a common goal. We then looked at all the things that would make a team achieve a great service, some of them being:



Attention to detail

Commitment

Communication and ways of communicating

Teamwork

Honesty

The above things were sort of a benchmark to people who are on board on the same bus. The bus as it is on motion; we looked and discussed that is every one on board, the right person to be there and if not a decision was made whether you fit in to the system or you ship out. This was accepted by every one that we were all willing to pull up the name of the Lukhweti team (which is the brightest star).

We all entirely agree that the values of honesty and integrity stood out when the feedback ball was in motion and also taking of responsibilities for playing the game.

Changing weather patterns challenged players. This was more than a challenge to them as it opens more avenues to learn from whatever situation that comes.

We as a team see ourselves going towards achieving the goal of being a team though we still have few bolts and nuts to tighten and loosen. We looked at how the team would benefit from honest feedback and we thought, that would be great and just to know that communication would be enhanced and trust would be created and hope for the future would exist in all avenues. We must fully agree that this session has had lots of goals scored i.e straight talks fine-tuning things, etc.

Regarding the team logo and theme for the breakfast, we will come back to you.

Based on the previous session, the team agreed that it would stop, not giving feedback wherever asked to do so and focus much on progress. We will also make sure that team coaching is given the respect it deserves, as it came out clearly, that it could help immensely to the development of communication, which will in turn enhance the business.

Thank you

From Lukhweti Team.

**Identifying data removed\***

**REFLECTIVE LETTER**  
**Re:**  
**SESSION 22: LUKWETHI TEAM (November 2005)**

**Dear Team Colleagues**

A new coaching year is awaiting us all. We are confident that the Lukwethi team will accomplish great things this year! X\*, a hearty welcome back on the bus.

In our last meeting, we conducted a SWOT analysis of your coaching experiences for the year 2005. Based on your feedback coaching is portrayed as creating direction and shifts in the team – not only individually, but also collectively. **We are wondering if you agree with this statement. If so, what has changed for you as a team based on the coaching intervention of last year?**

In the last reflective letter you were requested to give feedback regarding your team identity based on the power intelligence tool (remember we did some 'we are...statements'). I did not receive an answer from you. Maybe the question was unclear. Let me try again: **What do you currently believe about yourself as a team?** (This would indicate your beliefs about the Lukwethi team's identity). **What is your team dream for 2006?**

Last questions asked:

**How is the team right now? How have the last few weeks been?**

**What benefits do you want from the coaching session on Thursday?**

**What issues, challenges or questions do you want to explore on Thursday?**

We are still looking for feedback of the results of the implementation of the suggestion box. We are also still curious about the recommendation made in the previous session that HOD's should have meetings with their staff. **Who followed through on this action? (Remember to bring the evidence along!)** **How have you chained down information to your subordinates about the Bosberaad?**

Yours in coaching

Retha & Jeanette

**\* Identifying data removed**

14 November 2005 11:11 PM

Dear Retha and Jeanette

We would like to take this opportunity to thank you for the reflective letter which is so much detailed and relevant to all what we did in our team coaching. We have realised that the way we are conducting ourselves this point in time is indicating an incredible growth in both the team and in our daily operation, this includes confrontation in matters pertaining business. It is quite evident that if we employ this kind of move, we can only take our business from good to great. We feel that when we started team coaching we were not sure what was happening and what it was for. As we have been moving along the team coaching was able to reveal more of itself to us that it became a tool to take the team from good to great. The situation has started to unveil itself to every one that it is worth to be taken seriously. We looked at this as a team and thought that we are moving to the world or learning how to realise that we have the power to change and do things. There is on exiting thing that has started to happen within the team, i.e. every individual team member is getting to understand things in a business environment and can easily switch to solutions when there is a need or where there are some demanding causes of action. The fact that we are now able to convene a meeting with the general manager and take sound decisions is great achievement, also the general staff meeting we have always wanted to have with the general manager is now happening. We need to work on follow ups to see if the resolutions taken are met. We feel as a team we are making progress and can only look forward to greater things to happen next year.

John (pseudonym)

**REFLECTIVE LETTER**  
**Re:**  
**SESSION 24: LUKWETHI TEAM (April 2006)**

Dear Team Colleagues

Congratulations with your amazing turnover of R1, 368 mil for April. This is clearly an indication that the Lukwethi team is the “brightest star” above! **How did you do it? How do you plan to maintain revenue for your unit?**

We started the last session off by watching the DVD – “Celebrate what’s right with the world”.

The key concepts unfolded as:

- **Believe it and you’ll see it**
- **Recognize abundance**
- **Look for possibilities**
- **Unleash your energy to fix what is wrong**
- **Ride the change**
- **Take yourself to the edge**
- **Be your best for the world**

**Did you take away any lessons from watching this DVD that you have been able to use since? Do you agree that focusing on the positive can give us energy to fix what is not right? Did you fix anything in the past month based on radiating a positive energy flow? How did you practice being the best for the world in the unit?**

Next, we re-visited what is important for the team. We did this to finalize the team values.

**New team values emerged as:**

- Good team relations through open, clear communication, understanding each others’ realities and giving support (care)
- Dignity (“protecting each other”)
- Respect
- Ownership

**You have negotiated the following team values in the previous session:**

- Honesty – internal and external customers
- Good team relations through open (and honest) communication
- Super friendliness
- Service excellence
- Speed
- Cost effectiveness

If you could choose 5 team values from the above 10 values – which 5 would it be?

We noticed that the team dynamics has changed based on the changing team structure and process (two deputy GM's no longer part of the coaching sessions). **What are your ideas about this?**

We furthermore finalised the new team project, focusing on setting standards and achieving excellence through customer excellence. Kindly provide us with the guest comments for March and April.

We are looking forward to meet with you all on Thursday, 18 May at 13h00.

Yours in coaching

Retha & Jeanette



To: [Retha Visagie](#)

Sent: Friday, April 07, 2006 10:55 AM

Subject: Re: Reflective letter

Team Coaches,

The coaching clinics are such a blessing to the O group and surely I wonder if (the Director of Organisational Development)\* realize that she put in place a jewel for the group.

The coaching approach you as team coaches unleashes to us, makes us feel as if we are decision makers and it is an eye opener where one realizes if something is wrong with the ship or the sailor and you feel empowered to speak out so that the ship does not sink in your presence. In the past we did not dare question the general managers even if one could see there was something which needed to be corrected for the smooth running of the place because they had super-powers.

Team coaching if not coaches has equipped us to be part of the place and responsible for the day to day happenings in the establishment and any unbecoming behavior is stopped there and there without fear of victimization as we feel as partners with the owner of the group. The message passed on to us from team coaching simply says do not let the place fall before your own eyes as you are now given a full mandate to correct what needs to be corrected.

Your travelling four hours to and from the hotel is not in vain. What I realize is that team coaching is producing managers or future general managers; we are being equipped to face the World's challenges in a smart way where our decisions and input will be respected. Maybe you are not realizing what you are doing now but in the near future you will reap the fruits if O will continue with this programmed. Sometimes you may think the message is not being passed on but believe me that it is sinking as words are spiritual they have ways of resurfacing in power. The way you are teaching is not for head knowledge but sinks in the inner man if I may put it in a deep meaning.

Yours in coaching,

N

**Identifying data removed\***

**Sent:** 16 May 2006 12:47 PM

**To:** Retha Visagie

**Subject:** Re: Reflective letter

Dear Team Coachers,

Good to hear from you again. The million issue for April is from the grace of the Lord and I would not like to take that away from Him since it would be suicidal. In short God did it for us and we are still perplexed about what the Lord did and will continue doing as long as we do not take His glory and we give Him praise in His sanctuary and His firmament power.

The sales team has been given a free role in the playing ground and thus the fruits are visible and a carrot has also been dangled and who then does not want to perform to the best of abilities. The promises from the management to the sales team are being met and we are happy "Bunnies". There is nothing worse than being promised some incentives and then what follows is a change of tune from the top.

We have a big challenge and realizes that we have put ourselves in a tight corner by excelling and we now have to stretch and reach for more no matter what it takes.

We are on the verge of a cost saving drive which we hope will help us cut down on our cost and we are watching our spending so that we do not go mad as far as spending is concerned. Priorities will be the order of the day in spending though we are not from the East like the "Wise men" but we believe that God will help us as we do a lot of brainstorming in whatever we do as the two deputies has decided to get all of us (Lukhweti team) involved in decision making so that no one may then say "I knew it" because these kind of words comes from a peacock and this is a dangerous spirit.

We do believe in ourselves and we have seen the outcome and the abundance of business we are getting is just phenomenal and we are looking for possibilities and we are doing all we can to fix what was wrong in the unit and we are riding the change to the edge and we are a group of young blood who are thirst to prove to the WORLD that we are the brightest star and untouchables.

I am sensing something beautiful about this unit that will leave a lot of people in "AWE" as new things are just happening and surely this is the finger of the Lord God almighty. That DVD was

short but there was something magical about it and the words "BE YOUR BEST FOR THE WORLD" has send power to us and I wish this would be our slogan in the Lukhweti team.

This months figures were not good ones so we got together and made plans to get them right and we are truly amazed that we are half way of the month and the figures are telling us that we have exceeded the budget. I will not go into details but believe me we all just want to perform. Sometime last month I was reading one of the GM's meeting minutes and there was a part which said **(the hotel)\*** was not perfoming and that made me cry luckily enough my wife was in the kitchen and I was lying in the bedroom.

The values to choose by myself would be:

Ownership / Honesty / service excellence / good team relationship / cost effectiveness.

The issue of the two deputies being out of the team is all for the best for us as most times they were bailing us out in most things and we would then follow and then there would be a flow in the coaching process. We are on our own and we will stand as a team and will get out of the process of being spoon fed and protected as we realize that we were not going to grow but remain teenagers in their fifties.

God bless you all.

Yours in hospitality,

N

**Identifying data removed\***





# Appendix 7.3

## SWOT and metaphor analysis



**SWOT ANALYSIS OF TEAM COACHING  
PROCESS FOR 2003 - 2004**

**Colleagues present at coaching meeting:** 19 February 2005

**Coaches:** Retha Visagie  
Jeanette Maritz

**Team colleagues:** Room Division Manager  
Food and Beverage Manager  
Front Office Manager  
Executive Housekeeper  
Accountant  
Assistant Food and Beverage Manager  
Reservations Manager (Leisure)  
Maintenance Manager

**Absent from coaching:** Executive Chef (reported to be summoned by the king to receive some land)

19 February 2005

Dear Lukwethi team

Our last coaching meeting took place 3 months ago (13 November). We ended off last year by taking a look at coaching specifically, and evaluating our coaching experience based on specific criteria, namely positive changes in business performance, working relationships as well as how effectively new skills and knowledge are cascaded down to all colleagues within your business unit. The quality of living out the O Way as a manager was also identified as an indicator of the effectiveness of coaching.

Moments of truth with regards to coaching emerged as:

- More effective communication patterns within the team, but also with other colleagues in the business unit (it seems however as if there was still some sort of communication breakdown with regards to goals!).
- Building trust was mentioned as an important result from coaching.
- Creating a sense of belonging within the team and transparency also came out as moments of truth.

It seems as if change is a constant part of your reality. Last year you were exposed to major transformational challenges such as restructuring and team structure changes. We also start this year of with a key-changing factor by including Jeanette as your team coach. To put her into our team-coaching picture thus far, I was wondering if you could answer the following questions individually:


1. If coaching were a fruit last year, what fruit would it be?
2. If coaching were a tool last year, what tool would it be?
3. If it were the weather, what would it be?
4. If it were an animal, what would it be?

Warm regards, Retha

**Below follows a summary of reflective data from team:**

If 2004's coaching was a Fruit...	If 2004's coaching was a Tool...	If 2004's coaching was the Weather...	If 2004's coaching was an Animal...
<p><b>Positive experiences</b>  <b>Apple (2):</b> "I like an apple, it makes me feel good, gives me more ideas"; "nice and refreshing, sometime we come to coaching frustrated, coaching refreshes our mind-gives a good spirit-we share problems, get new ways how to deal with them"            (Problem-resolution/ motivational/ sense of connectivity/fun)  <b>Pineapple (1):</b> "juicy, I get a lot from coaching, business</p>	<p><b>Positive experiences</b>  <b>Machete (1):</b>            Coaching should be "clearing paths to get to a new destination".            (Gives direction and focus)  <b>Computing device(1):</b> "filter unwanted materials, adds value, a virus guard, utilise the ones that are active...the lemon is a virus we need to look at it" (Problem resolution)  <b>Voltage tester (1):</b>            "individuals</p>	<p><b>Positive experiences</b>  <b>Spring (1):</b> going from cold to a change of season... takes from dark to new future" (Gives direction and focus)  <b>Over cloud (1):</b>            "patches of sunshine...go from uncertainty to hope/light...let us persevere and go forward...so did we (Gives direction and focus)  <b>Sunny (3)/Summer (1):</b> "everything is shining... coaching</p>	<p><b>Positive experiences</b>  <b>Elephant (2):</b> "strong family unit... team coaching our matriarch –leads us"; "Elephant is a strong animal...when there are challenges in life...go forward(Sense of unity/ Gives direction and focus/ strength);  <b>Eagle (1):</b> " (soars) above the storm... selective...chooses high places to live, goes beyond the clouds- above the</p>

<p>changes (bookings) we are becoming better people. Coaching assisted in communications skills specific with regards to conferencing” (Empowerment - personal) <b>Orange (2):</b> “juicy ... coaching gave energy how to deal with problems”; “orange always improves my appetite...coaching does the same, helps to teach how to do my job, getting skills... which way did you do it...conference coming delegate the jobs, check later” (Problem resolution/ Empowerment business wise) <b>Peach (1):</b> “when you bite it...as water, juiced- be juiced by coaching. You take things with pride and confidence. You better know what you are doing. Coaching excites, gain</p>	<p>(connect)” –(Create a sense of connectivity) <b>Wheel spanner (2):</b> “when you drive a car a wheel spanner is very important... management team- needs to be trained...” (Correcting device/Problem resolution) “start, stop, continue- need wheel spanner to fix the tire; coaching helps you get there if you have problems, e.g. brainstorm” (Problem resolution) <b>Pick (1):</b> “coaching digs out info about our team colleagues to understand better...” (team building aspect) <b>Shifting spanner (1):</b> “use to adjust to any kind of nut... to fix, you adapt... you can’t say ‘no I am just a housekeeper’, you need to be flexible...” (Understanding the bigger picture of the</p>	<p>has some positive things such as knowledge, connectivity” (Creates a learning environment, also sense of connectivity); “if I get cold I am frustrated...lot of changes... motivated me”; “when I thought is was dark...after coaching it is lighter... motivation”; “Summer time... grows on me motivational...I was down and out (past Gm), now it is summer time...I a happy man/bunny” (Motivational device) <b>Rainy (1):</b> “We all need rain, there to correct difficulty- problems if there is no rain- coaching fix certain problems- working relationships” (Problem resolution – interpersonal relationships) <b>Warm (1):</b> “Makes me feel</p>	<p>storm...evolve around planning” (Problem resolution/planning) <b>Horse (1):</b> “everyone wants to ride it, a kind animal, enjoy it, fun...” (Sought after, compassionate and fun) <b>Donkey (1):</b> “kind animal, when you have a lot of work to do- the donkey is useful and helpful” (Compassionate/gives direction and focus) <b>Dove (1):</b> “brings joy and peace” (Fun) <b>Lion (1):</b> “very bold, confidence and self-esteem, unafraid... learned to be bold.” ( Intra-personal and interpersonal empowerment) <b>Fish (1):</b> “swims, always happy... trust myself” (Intra-personal empowerment).</p>
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<p>knowledge, time for sharing, discussions. Interaction, team building (aspect) important.” (motivational/personal empowerment) <b>Strawberry (1):</b> “Coaching should be interesting, refreshing enjoyed by many, luxury food...enhancement and growth” (Coaching seen as luxury)</p>	<p>business) <b>Hammer (1):</b> “<i>tool that helps me...my attitude has changed didn't know I had to communicate...broke the walls....</i>” (Intra- and interpersonal empowerment)</p>	<p>good...coaching makes things (on different levels) bright to me” (Motivational device)</p>	
<p><b>2.Negative experience of coaching</b> <b>Lemon (1):</b> “I have a lot of problems in maintenance...power failures, not making targets. Why team coaching? Lemon sour- has a lot of problems to attend to and (coaching takes time away that could be spend on doing the job.” Frustrated.</p>			

**Repetitive themes indicating the teams’ experience of the coaching process in 2004:**

All expressions about coaching were positive, with the exception of one (possibly related to specific maintenance challenges that the team colleague had on this specific day):

**Team coaching:**

- Provided direction and focus

- Created a sense of connectivity (team-building aspect)
- Problem resolution strategy
- Motivational
- Empowered team members (business wise, on intra- and interpersonal level [improved communication practices]; also created a learning environment)
- Was FUN
- Compassionate practices (practices of respect)

**Unique themes:**

- Coaching a way of understanding the bigger picture of the business
- Coaching seen as a “luxury” and “sought after” intervention

**Unique negative theme:**

- Coaching portrayed as a time-robber



## SWOT ANALYSIS (Coaching process 2004 & Way Forward)

A SWOT (strengths, weaknesses, opportunities and threats) analysis was conducted next with the team as a way of assessing their experience of last years' coaching. The data obtained from this assessment process, in conjunction with data about coaching expectations will establish a baseline to plan coaching interventions for the year 2005.

### SWOT ANALYSIS

<p><b>Strengths</b></p> <ol style="list-style-type: none"> <li>1. Bringing the team together - team building quality/ Sense of unity</li> <li>2. Motivation - drive</li> <li>3. Sense of belonging/being an asset (recognition)</li> <li>4. Ownership</li> <li>5. Productivity increase</li> <li>6. Knowledge, skills and ability increase</li> <li>7. Expression – an opportunity for self-expression</li> <li>8. Empowerment on a personal level (Growth in confidence)</li> <li>9. De-stresses</li> </ol>	<p><b>Weaknesses</b></p> <ol style="list-style-type: none"> <li>1. Not enough team based homework (individual based homework)</li> <li>2. Different levels of understanding in the team (time robber in sessions)</li> <li>3. Coaches have a lack of understanding the Swazi culture</li> <li>4. Lack of feedback (Send through the reports)/ Communication breakdown</li> <li>5. Time framing (coaching on weekends)</li> <li>6. Lack of follow-up in terms of: homework</li> </ol>
<p><b>Opportunities</b></p> <ol style="list-style-type: none"> <li>1. To grow &amp; develop effective communication skills</li> <li>2. Enhance understanding –self, context, business</li> <li>3. Execute what has been achieved</li> <li>4. Self improvement - O staff becomes sought after</li> </ol>	<p><b>Threats</b></p> <ol style="list-style-type: none"> <li>1. Major events (bus full of tourists arriving, planned major events at times of coaching, etc.)</li> <li>2. Catastrophes</li> <li>3. Cultural events/expectations to attend cultural functions</li> <li>4. High-jacking forces: head office (excellence model)/internal politics/venue of coaching at Hotel)</li> </ol>

#### **MOST IMPORTANT COACHING EXPECTATIONS FOR 2005:**

1. Personal growth
2. Understanding the O way
3. Goals
4. Linking whatever we do to customer service excellence
5. Team building

## APPRECIATIVE M&A TEAM COACHING PROGRAMME TO FACILITATE MANAGERS MENTAL HEALTH FOR SUSTAINED PERFORMANCE

Feedback of SWOT analysis conducted to valuate the team coaching process in 2005.

### Key business drivers:

Financial perspective, Internal Business Process Perspective, Customer perspective & Learning and Growth perspective.

### SWOT ANALYSIS: COACHING 2005

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Inclination to make things happen – “power of boldness to open gates that you thought would never be open” – confrontational skills</li> <li><input type="checkbox"/> Growth in understanding other people’s point of view</li> <li><input type="checkbox"/> Less fearful in terms of intimidation</li> <li><input type="checkbox"/> Team unity – “people can understand each other better”; “when there is a decision to make it is collective”.</li> <li><input type="checkbox"/> More trust</li> <li><input type="checkbox"/> Sharing ideas – “individuals have taken ideas to the team...we deliberate very finely without fear of influence”.</li> <li><input type="checkbox"/> Improved communication practices – “More communication”</li> <li><input type="checkbox"/> Increased confidence (individual and collective)</li> <li><input type="checkbox"/> Positive perceptions about team – “strong power” and “boldness”; “In our culture we were so humble – we didn’t get things right...now we are bold”.</li> <li><input type="checkbox"/> “We have learnt to be flexible in terms of management...we have to adapt” (dealing with change constructively)</li> <li><input type="checkbox"/> More persistent and assertive – “it is your problem...no I go back to the GM”.</li> <li><input type="checkbox"/> Take more responsibility</li> <li><input type="checkbox"/> “We care who is who in this zoo”...“we are in business”.</li> <li><input type="checkbox"/> “The unity of one”.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Inability to cascade coaching experience down to other levels</li> </ul>





Opportunities	Threats
<ul style="list-style-type: none"> <li>❑ Involving others to the experience</li> <li>❑ Sustainability of learning</li> <li>❑ Growth as an individual – “it is an investment”</li> </ul>	<ul style="list-style-type: none"> <li>❑ Losing team members</li> <li>❑ “If we don’t make revenue”</li> <li>❑ Dealing with unhealthy people and practices</li> <li>❑ Perceived lack of support from sales team at HO</li> </ul>

**MOST IMPORTANT COACHING EXPECTATIONS FOR 2006:**

1. New ideas – innovative coaching
2. Need to benchmark and network with colleagues in other units, e.g. coaching at Nelspruit
3. Sustainability and to maintain team work
4. Focus on customer care

**What can us as coaches do differently in 2006 to ensure that the Lukwethi team continuously moves from good to great?**

- ❑ *“Motivation is the key to success”*
- ❑ *“Give us an opportunity to give them topics to be discussed in the next team coach(ing), at least one topic from the team”.*
- ❑ *“It is evident that now we have moved from good to great and if coaches can work on a way forward so that we can navigate other new things to help us sustain the growth pattern”.*
- ❑ *“Time keeping is very important...everything that is on the agenda must be given time...”*
- ❑ *“support again as in this year”.*
- ❑ *“No differently but continue to be supportive to the team”.*
- ❑ *“To continue being supportive and I believe the achievement we achieved this year are nothing to what we will achieve in 2006 because you have believed in us”.*
- ❑ *“I think the coaches are doing very well so far, one can only hope that they continue the same way next year”.*

**Competencies identified that should be developed in 2006:**

- ❖ Managerial skills
- ❖ Cross training
- ❖ Cascading of learnings
- ❖ “I can do” attitude – execution intelligence

**Team values aligned with company values:**

- ❖ Good team relationships
- ❖ Dignity and respect
- ❖ Honesty
- ❖ Service excellence
- ❖ Cost effectiveness

**Potential coaching themes for 2006:**

- ❖ April: Re-visiting team values and crafting the Lukwethi way
- ❖ May: Finalising values
- ❖ June: Team quiz – “The O Way”
- ❖ July: Stop, start & continue
- ❖ August: Meetings, bloody meetings
- ❖ Sept: Living the O way and discussing key business drivers and ways of cascading O way to lower levels
- ❖ Oct: Session focusing on achieving outstanding agenda items and how to translate key business drivers in order to cascade it down



# Appendix 7.4

Field notes (retrospective, auto-ethnographic & observational)



# Retrospective field notes

2006-12-28

How did this story begin? Over time, we attempted to work our way through the barriers of unfamiliarity, distance, and difference towards a spirit of collaboration, understanding and openness to experience and participation. “When we learn how to open ourselves and to each other, we find it easier to drop some of our resistance to different ideas.” (Ellis in Denzin & Lincoln, 2003: 244)

2006-12-27

Things are really falling in place. It is as if I have a question in my mind. Next day I open a book and the answer lies there, waiting to be uncovered. When I decided to use auto-ethnography as a research strategy, I was concerned: “I want to merge my story with the story of the team, but I haven’t been keeping extensive notes about personal reflections, reflective conversations with others...I think I’ve slipped up, telling myself that I will write it down, just to find that it is another time and another reflective conversation...” Then I opened Denzin and Lincoln (2003: 227 - 228) and read about auto-ethnography as described by Carolyn Ellis in a conversation with a student about note taking. The student voiced a similar concern. Carolyn stresses the fact that adequate resources is of the utmost importance when representation is your goal, but I was intrigued by the questions she asks: “Do you think notes would tell you what actually happened? Aren’t they partial interpretations as well?” She continues with these thought provoking argument:” The truth is that we can never capture experience. As Art said, ‘Narrative is always a story about the past,’ and that’s really all field notes are – one selective story about what happened written from a particular point of view for a particular purpose...realize that every story is partial and situated.”

2006-12-26

I read through my Creswell notes and note Ann Muller’s statement that the single biggest indicator for doctoral success is the candidates’ ability to tolerate ambiguity. How well am I tolerating ambiguity? What does ambiguity means in this research? Let’s do an electronic Thesaurus check of the word ambiguity. The following words popped up: vagueness, uncertainty, doubt, haziness and indistinctness. Reflecting back, how would I apply these words to my own research journey?

I commenced the research process in a haze of vagueness. I was compelled to implement my previously designed programme. I wanted to evaluate it. But how specifically? Coming from a health sciences background, I did not know the Hospitality Industry that represents the context for the research. Even though I read extensively about M&A's for my Master study it was mere head knowledge. Personally I was not exposed to M&A activities then (only later did I become part of these stories with the merging of the academic institution where I am a student and part time lecturer). I often hear myself telling people at research conferences and gatherings that "I didn't seek my research topic on a conscious level – it somehow found me..."

In the first meeting with my two promoters, Prof M & C as I refer to them in my mind, they shed some light on how I should go about conducting research, based on my need to implement my previous research endeavor – "follow a programme evaluation design, go into the field, meet with the prospective participants and conduct a situational analysis in order to establish if your program is transferable to the context". I must confess, even though it made sense, I was uncertain about how to go about reaching this objective. The design for this study was engulfed in a mystic haze of vagueness initially and thus in hindsight, met the criteria of ambiguity. Operationalising the proposed design was also mysterious for the biggest part of this research (not sure if it is safe to confess this! So grateful that I am not conducting a quantitative study!). Reading Wadsworth (1997) "Evaluation on the run" did not add comfort to my, by then, escalating sense of ambiguity.

The ultimate design can be linked to what Denzin and Lincoln (don't know exact page – Collecting and Interpreting Qualitative Materials) describes as an emerging design. It is only now, almost at the end that things are really starting to fall into place. Not all things. Merely more things I should say. This process of ambiguity did, and still do not add to my emotional comfort. What carried me through is the belief and affirmations of Prof M & C, acknowledging my intellectual capacity as well as my heart for people! Also belief in myself and the value of eliciting the stories of those who is silenced by M&As in this context.

Another contributing factor was that I discovered through my masters' dissertation that I love research with some kind of a paradoxical love – I love the unknown and re-discovering new meanings yet the unfamiliar are fear-provoking at times. I love spending time in the field, yet it means time away from my loved ones. I love discovering new knowledge, yet sometimes my mind is burdened by too much information. How shall I merge my different roles – the role of a researcher and emerging team coach throughout the research process?

Only with time did I grasp that research and coaching are not separate entities at all. The focus of these activities may differentiate, but who I am is part of the holistic engagement with who I am at that moment. Art Brochner (in Denzin & Lincoln, 2003: 234) supports this view in a conversation with a colleague (Carolyn Ellis) and a doctoral candidate: "...therapeutic training probably should be a prerequisite to being an ethnographer".

When I look back, I realise that I did work in a systematic way to achieve the aim of the research. Probably a combination of embracing ambiguity and engaging in conscious planning while holding on to the magic of research.



# **Auto-ethnographic reflection: How did the team coaching process assist me personally, with other people and with my working environment?**

**Personally**, I have gained confidence in the way that I deal with challenges – I have grown in my ability to confront issues that may interfere with performance. I know that the team appreciates my input and values my contributions – they indicate that by verbally thanking me for my “support”. On arrival, we are recognized in a positive affirming way – hotel staff looks happy to see us, displaying a super-friendly attitude and verbally and non-verbally indicating that they recognised us – we get VIP treatment! I therefore feel worthy in this context transpiring to other areas of my life.

Confidence is also displayed in the way that I adapt to changing situations. I am less fearful I would say. I think I have learned to deal with critique more constructively. Feedback that I perceive as less constructive still stirs emotional discomfort, but the outcome is different – I refuse to allow feedback to rob me of my self-worth. Instead, I reflect (A LOT) and then make a choice that fits my value system in order to deal with the feedback and to take positive action.

The coaching arena also assisted me to manage conflict more effectively. In essence, I reclaimed my voice in situations of conflict. I specifically remember an incident when one team colleague attacked the other and how I stepped in as a negotiator – I got feedback from colleagues that my behaviour won their respect.

I have gained skills to use past experiences as a constructive measure to improve performance levels (my own as well as that of the team). The fact that I perceive the team as “my team” creates a strong sense of ownership and involvement from my side. Coaching at this unit is a spiritual experience to me!

Personally, I have made a major shift in terms of how I facilitate the coaching sessions. It can ascribe this transformation to how I have evolved in my role as a team coach. I do not deny my softer therapeutic side, but I am more outcomes oriented – thus operating from a higher level of personal and collective accountability. Coaching in this context adds meaning to my life because I am engaged in something of significance.

**My relationship with team members, the team coach and other hotel staff**, moved to a deeper level of connection because of the prolonged engagement in this setting. These relationships have convinced me that coaching is indeed a relationship based on trust, respect, and honesty, understanding and active engagement. It provided me with the opportunity to earn respect and trust – to understand the business culture as well as the Swazi culture in more depth. I believe that my prolonged engagement with the team was crucial for building these deep connections.

In terms of my **relationship with the environment**, I think I have grown in my ability to adapt to ambiguity and change. I am also able to transfer what I have learned to various professional and personal contexts, such as teaching and education, as well as my private sphere of family and friends.





# Field notes: Individual qualitative interviews

I found the interviews meaningful. This is a confirmation that the coaching process did make a difference in the lives of managers. It became evident that the programme facilitated mental health as an important indicator of Return on Investment (ROI).

## Qualitative Interview with J – 22 May 06

J displayed a positive attitude regarding team coaching and individual coaching – he sounded proud when stating that he “did not miss any sessions”. He clearly linked performance outcomes (goal-setting) to the coaching process, as well as Return on Investment.

He stated: “It grown me...taught me to stand up and face situations...”

Developing a questioning mind and ability to make decisions emerged as relevant themes.

He stated: “It is an investment that cannot be denied...”

After the audio-tape was switched off we had a conversation about internal versus external coaches – he contends: “I actually mirror you as one of us...”

It seems as if it is not about the external/internal debate for J, but rather about the relationship between the coach and the client. Trust evolved as a cardinal aspect in achieving results.

Sustainability of team coaching programme: “...even if you leave you will take it along...specialist knowledge...”

Personally it was great getting this feedback – I am elated that ROI and sustainability emerged as themes!

## Qualitative Interview with V – 23 May 06

It sounds as if the team coaching programme assisted V to gain competencies as a manager – she stated that she departed as being “uncertain initially” and that she lacked “direction” – the ability to set goals was also mentioned as linked to the coaching process.

Cognitively – “start to think clearer...in a different way...”

Extension of value of coaching process to outside world – “helped me a lot personally ...outside...”

In work – lacked passion before – now pleasure to come to work – team “unleashing”

### **Qualitative Interview with T – 24 May 06**

T joined the coaching process initially and was part of the induction process. Then he was taken out of team coaching based on perceived performance failure in his human capital functions – he was moved into the position of debtors and creditors – reason for inclusion in research project: respect for his contribution to the research – I remember how eager T appeared to gain learning opportunities and how he reflected that team coaching is assisting him to deal with his immediate family in a more emotional intelligent way.

Self-discovery – honesty/trust/disclosing

One common goal – results orientated

He states the need for cascading what happens in coaching: “we need to drive that with all managers...”

He suggested the implementation of a mentoring programme – will be put on agenda and discussed with managers in next team coaching session “adopt one or two kids and bring them up properly...”

I felt good for including T in the research – I practiced respect and he gave feedback that it was “good” – while talking non-verbally he was actively involved – when I inquired about the termination process regarding coaching he stated simply that he “had enough on his plate...” to assist him to deal with life (sustainability of coaching) – he appeared uncomfortable at that specific point and it may be related to pride/hurt of what happened.

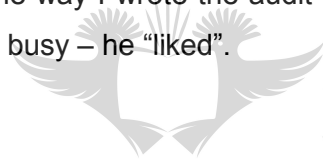
He seems eager to get information from coaching – I committed to provide him with info.

? Cultural challenges working for a female manager – prefers that I should not ask her to cascade info down to him but rather asks

## Qualitative Interview with P 23 May 2006

During interview P demonstrated a willing attitude to share. He seemed to be positive regarding the coaching process. His need for recognition clearly displayed during the interview – he would adamantly ask me my ideas in terms of specific questions that I ask about him – I was surprised by this behavior as demonstrated by my response to him (not clear what he expects from me! Sounds unsettled!). He also stated that I should ask his wife about how the programme changes him and he introduced me to her. A shared that her husband is dealing with his anger better and that he is also more approachable and communication between them improved! (Coaching's impact extended to the outside world).

P shared that he was initially resistant – did not trust the process and thought that I was doing the “search” for myself. Trust was clearly an issue and prolonged engagement assisted with that! Interesting was also the fact that he is clearly stated the importance of the coaches being involved with operations. It seems that P perceives us as more credible because we are doing the audits at the unit and visits his kitchen and his staff. He stressed the fact that we should continue with this practice. Understanding his reality seems to be crucial to him – he mentioned that the way I wrote the audit report – mentioning the fact that the kitchen was fully operational and busy – he “liked”.



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# Appendix 7.5

## Coaching logging report



## **TEAM COACHING REPORT**

### **SESSION 20**

### **LUKWETHI TEAM**

**(15 September 2005)**

#### **1. PURPOSE OF REPORT**

The purpose of this report is to give feedback to the Chief Executive Officer and the Director of Organisational Development about the team coaching meeting held on the 15<sup>TH</sup> of September 2005 with Lukwethi team colleagues. The team requested that this report should additionally be disseminated to the General Manager of the unit.

#### **2. BACKGROUND**

The team underwent a stressful period related to management challenges in the unit. The General Manager was previously blamed for misconduct and the previous three sessions (June, July & August) focused explicitly on conflict resolution and problem solving strategies on team and unit level. Coaches paid attention to the movement of the team from a state of perceived paralysis indicated by blaming behavior and practices of miscommunication, to action in terms of what they have control over to ensure that key business drivers (customer service excellence and revenue) are not neglected due to the conflict. The last session focused on Customer Service Excellence (CSE) and the team did a walk about to assess CSE levels in the unit.

#### **3. COACHING PROCESS (15 September 2005)**

##### **Colleagues present**

**Coaches:** Retha Visagie  
Jeanette Maritz

**Team:** Room Division Manager  
Food and Beverage Manager  
Front Office Manager  
Accountant  
Executive Housekeeper  
Executive Chef  
Reservations Manager (Leisure)  
Maintenance Manager  
Assistant Food and Beverage Manager

**Apologies:** None

### **3.1 Preparation for Meeting**

The team got homework in the previous meeting to design well-formed outcomes to address the identified Customer Service Excellence (CSE) challenges and to re-enforce strengths in the unit regarding CSE. The team resisted the taking of action in the session, somehow shifting responsibility. It was then decided that they should get together as a team and coordinate the activity of setting well-formed outcomes. Minutes of that meeting were never received however. Prior to the team-coaching meeting it was decided that we would **pay attention** to factors that block the taking of action at unit level in an attempt to increase personal and team autonomy. We also decided to go in with a relatively open agenda in order to focus on the needs of the team and to create space for sharing. We wondered about buy-in with regards to key business drivers and decided to check it out in the session. **Thoughts & feelings we had:** We wondered about the underlying message of the team's behaviour, possible ways of moving the team forward and how positive changes in the unit could be facilitated and sustained.

### **3.2 Coaching Meeting**

Team colleagues were welcomed. It was made clear that the coaches came with a relatively open agenda. A reflective letter was not being sent to the team this time related to a lack of response to the reflective letter in the past. Coaches wondered about the value of reflective letters to the team yet again. The team made it clear that they value the letters and appreciate receiving them.

#### **3.2.1 Process and structure of Meeting**

##### **Intervention 1: Reality check**

The team was requested to share their reality of the current situation. Comments included:

- *"Team are facing their problems more focused..."*
- *"M carries on going forward...being honest to self and others..."*

##### **Expectations for the session transpired as:**

- *"Let's work..."*
- *"Time management of the session should be controlled...some people are talking too long..."*
- *"Get solutions on the last session..."*
- *"Concentrate on what we have control over..."*
- *"Action" needs to be taken..."*

## **Intervention 2: Buy-in demonstrated in key business drivers**

Question asked: What is in it (CSE & Revenue) for you?

Team responses include:

- *“You need to have a passion and believe in what you are selling...”*
- *“...bonus when guests come back...”*
- The business drivers result in *“getting my salary...company grows...(community responsibility) soup kitchens...decrease in retrenchments...”*
- Some team colleagues express that losing revenue is a reality in the unit when room rates are *“slashed”* and casino rates given out inappropriately. The cheaper room rate has a direct effect on the housekeeping department on a financial level – creative ways already implemented in dealing with this challenge shared in the session, such as selling of outdated stock. Ultimately it results in a decrease of team morale however in the housekeeping department.
- Team apparently not always informed about the financial status at the unit and the sales figures not displayed in all specified areas.

Problem resolution emerges as attention to detail in the unit – maintenance should be a priority such as fixing the broken lifts etc. Team colleagues gave feedback to each other of what they noticed during their walk-about to assess CSE. They were also requested to share what they have done about identified challenge areas in terms of CSE to evaluate learning integration. All team colleagues that were present during the last coaching meeting could report on one or more things that they have changed as a result of that session!

### **3.2.2 Outcomes determined by team**

- Team behaviour reflected candour and they express the following questions that they want to be answered by the GM. Action will be taken by coach to disseminate the questions to GM before the next team-coaching meeting on the 14<sup>th</sup> of October.
1. How far is the investigation concerning the fraud allegation made by the GM on the 10<sup>th</sup> of July 2005? Who is involved and what is happening?
  2. Do we have to be aggressive as a team to be heard by the GM?
  3. When are we as a team sitting down to discuss the long work hours and the issue of overtime? The loan-work system is not working effectively.
  4. What about petrol allowance for those managers that use their vehicles as taxis?
  5. What is happening about P's increase?
  6. What about a hotel driver and a car to transport staff working double shifts? If not, what is the solution?

7. When are we doing a safe maintenance as requested before?
8. When are we doing a full maintenance on housekeeping laundry and non-working machines?
9. Who decides on suppliers used and why?
10. Why can X not sign orders for the Hotel?
11. What about the R1million for refurb?
12. What about a staff pension fund?

In order to address low staff morale and miscommunication fortnightly solution focused management meetings will be done focusing on strategies and hotel problems with clear actions. An agenda and minutes of these meetings will be done.

**Who will be included?** Management team and GM

**When?** First meeting to be held on the 5<sup>th</sup> of October; then 19 October, 3 November at 15h30 pm.

**Chairperson:** J

**Secretary:** C

Possible agenda points discussed:

- Welcome
- Introduction of members
- Structure/purpose of meetings
- Guest comment analysis
- Guest comment solutions
- Revenue and budget analysis
- Cost savings analysis
- Human capital
- Refurb matters
- Uniforms
- What projects are we busy with? Fidelio
- Reservation computers and furniture – request headsets
- Pastel for account and bigger server
- Housekeeping equipment



The team described the purpose of these meetings as the “strategic way forward”.



### **Following suggestions made:**

- HOD's should start meetings with their staff;
- Suggestion box should be implemented;
- Feedback should be given on a regular basis e.g. providing minutes of the above strategic meetings on the board;
- Staff meetings once a month.

### **3.2.3 Homework**

Homework focused on the implementation of above stated outcomes.

### **3.2.4 Group Process and Group Dynamics**

Team process focused on problem-resolution from commencement of the meeting. Almost first time in the history of the team that they clearly reflected back on a previous session during the coaching process and requested continuation based on the issues discussed then (CSE). Team colleagues furthermore displayed candour by giving honest and frank feedback. They sounded more empowered to deal with challenges (voice tone and volume). Most team colleagues are however not only talking, but it seems as if they are willing to take action and they already started the process of change. M appears to be well accepted by the team. He facilitated the outcomes part of the meeting and managed himself well in the performance of this activity. The team made it clear that they are moving forward with or without assistance on unit management level.

### **3.2.5 Integration with Values and Key Drivers**

Linked to customer service excellence and revenue throughout.

### **3.2.6 Challenge Area**

Perceptions of leadership in the unit:

- GM not trusted by team colleagues related to certain realities.

### **3.2.7 Evidence of shifts**

Team: More action oriented and displaying increased candour in communication. Increased sense of team unity displayed in behavioural terms.

T took responsibility to facilitate the creation of certificates for the year-end breakfast.

### **3.2.8 Reflective notes**

#### **Things we learned about the team**

The team clearly understands the importance of CSE and revenue as key business drivers and they are aware what is in it for them.

#### **Things I learned about coaching**

Team involvement in the setting of outcomes is of cardinal importance to enhance buy-in and ownership.

### **3.2.9 Feedback**

“Excellent session – fostered the principle of taking action”

“...we need to take ownership...giving individual participants’ voice...”

### **3.2.10 Next session**

14 October 2005

#### **Follow-up:**

Reflective letter will be compiled and send to the team.

Report of session will be compiled and send to CEO and

Director of Organisational Development and General  
Manager.



## **4. GOAL-MEETING**

Refer to the attached minutes of the meeting.

## **5. CONCLUSION & WAY FORWARD**

The teams’ need to be heard is clearly demonstrated by the questions that they had asked.

Prior in the year we discussed the value of feedback and how important honest feedback is in order to be a great team. Seems as if the team internalised some previous learning that took place and they have grown in their ability to confront issues.

Report compiled by: R Visagie

Date: October 9, 2005

# Appendix 7.6

## Qualitative individual interview transcript



# Individual qualitative interview (3)

Duration: 20 Minutes

Interviewer	How did the team coaching process assist you personally, with other people and within your working environment? There are three aspects to the question but you can start answering any of the three.
Participant	Um, it assisted me a lot in discovering who I was you know, because I was able to open up in so many things. I used to close up especially when I didn't understand something I would just close up...I wouldn't say much. (Minimal verbal response: Interviewer) But every time I came to the team coaching session I would be able to go back and I would be able to say something, you know. It really helped me a lot. And...because I was not sure where I was strong and where I was weak, it made me realize my weaknesses and my strong points and that actually helped me to be able as a leader to talk to my people and to guide them when they have problems and such things. And um...ja.
Interviewer	Ok, so what I heard you saying is that the team coaching helped you to find out who you are, it helped you to open up where normally you would close up you were now open. You were also able to identify your strengths and your weaknesses, but what I also hear you saying, is that it also enabled you to take your experiences down to the people you were leading.
Participant	Yes, because like um, I remember when I started you know, here, when I came to work for these people here, there were retrenchments and they were very very difficult people and that really became very difficult for me to work with them because they were angry and they were... So I really didn't know what to do. So I used to have a lot of difficulties but when I started with the team coaching it helped me a lot. We relate better now with my staff. I think it's the help of...we used to relate but it was not as good as it is now.
Interviewer	If you could be a bit more specific in terms of your relationship with your staff, what is different now? What do you do differently related to the coaching process?
Participant	Now I'm able to sit with them you know, like I'll even go to the staff canteen and we sit and we eat and we talk. They are free with me you know, they say anything. But before I used to be in my office and I would just tell them things to do and if they don't do them I'm angry, I call... I don't know, I never

	used to understand their minds and their thinking but now I'm able to understand these people are under such and such pressure that's why they are behaving like this you know, I understand their behaviours better.
Interviewer	In terms of getting new awareness and knowledge you found out who you are but also who other people are and what makes them tick.
Participant	Yes. I used to believe you know, I used to believe I understand people but I discovered that I didn't. (Laugh) But that's what I used to believe because even in school they used to say they can talk to me because I understand people but I realized when I became a leader that I don't understand people that well. Because when such problems come up I don't know how to deal with them.
Interviewer	So how has the coaching process assisted you to deal better with the people?
Participant	Um...what can I say...you know...I don't know... (Sounds nervous and unsure)
Interviewer	Take your time.
Participant	I can't quote any sessions but every time I came out of a coaching session I came out with something new which made me do things better. Although I can't quote that this and this, you know, but...I don't know...how can I put it... Because it actually made me realize who I was and that made me to be able to approach things in a different way which actually helped me and the next person. I don't know, I can't say exactly what happened but I knew that you know, coming from the team coaching and approaching things in a different way because you know, they used to...coach us like: "you don't do things like that, what if you do it this way?" and then I would try that and it would help me and even the role-plays, they helped a lot, the role-play you know...it opened your mind.
Interviewer	It sounds like the coaching process and the coaches stimulated you by asking certain questions – how about doing this, or how about doing it differently – so what I heard firstly was the kind of questions that they asked and then you also said the role-plays were helpful to you...
Participant	Yes, I used to do role-plays which you never thought would help you, you think you are just playing around and yet that thing is actually helping you somehow.
Interviewer	Can you maybe think of any knowledge or something that you learned more of in terms of the team coaching processes?
Participant	(Silence)

Interviewer	It's ok. (Sounds empathetic)
Participant	(Nervous laughter)
Interviewer	You already mentioned that before you were quite closed and now you are more open. Anything else that you are doing differently now? Either in terms of yourself or other people or in terms of your working environment.
Participant	In terms of working environment I am now I'm able to, I'm able to delegate properly you know, delegate work and follow up you know, it's not like you just expect people to think that this is what you want. I am able to explain this is exactly what I want, I mean if you do it like this and it's not like detecting, talking one on one saying "what if we do it like this, I think we will finish the work earlier if we do it like this, what do you think?" you know.
Interviewer	So it's a much more collaborative process that you involve the people in?
Participant	Yes
Interviewer	Anything else that you can think of that you do differently?
Participant	Um...differently... (Silence)
Interviewer	Or that you maybe do better? That you were doing well before but maybe now doing it better?
Participant	(Silence) I think more than anything, more than anything else it's the communication that really improved in me. It greatly improved.
Interviewer	Maybe in terms of other people and the rest of the management team or other relationships around you, other than just with your co-workers? Or with the people important to you?
Participant	With the rest of the team, with my colleagues, team coaching made us one. You could see you know, it wasn't like: "this is my job and I am doing this" it really made us one. People come to you now and say...before you know they would think if it's X's job then it's X's fault and...but now what they do my colleagues, they come to me and say: "X, this and this is happening. Do you know about this?" you know, not just letting things happen and damages and then they say: "Ag, it's her department". Now they are able to say: "There's something...something happened last night. Do you know about this?" and then I would explain why, you know, and such things, but before they would think: "we'll deal with her when it gets there" but now they try to help and solve the problem even when you are not there, you know. I also do the same, you know.
Interviewer	So there's a greater sense of unity – you are now one – and also a shared responsibility, it's now not just you standing on your own, it's a collective response.

Participant	And then if the damage is done they don't think: "I have nothing to do with it".
Interviewer	What happens now if there's "damage"?
Participant	Now they try and fix it. And then they say: "You know we did this and I don't know if it was right", you see, and then I say: "Oh, you really helped. It's good!"
Interviewer	So it sounds generally as if the teams' effectiveness has improved because of the process.
Participant	Because of the process...ja... I think I relate it all to team coaching because I wouldn't know what actually changed their minds but I think it's team coaching.
Interviewer	How else did the coaching process affect your team relations?
Participant	Um...(Silence) I can't think of anything...(Silence)
Interviewer	And you're working environment?
Participant	I think it has because...um...things in my environment have improved you know, I think it's because of the team coaching which made us one you know, to be united, and to help each other and um...because...even now the staff feel "Oh, the team coaches are here. What's going to happen today?" you know, they ask you. Ok, maybe they are not actually sure of what happens but they come: "Hey, what's happening in the team coaching?" and then I just tell them we did this and that you know, I don't know if they understand exactly but they are excited about it when the team coaches are coming – "so you are going to the team coaching?"- I say: "Yes", but um, I'm not sure if they understand exactly but it's doing something to them...they get excited that the team coaches are here and what...(Laughing)
Interviewer	So in a sense it kind of spins off to them as well?
Participant	Yes, but I don't know how...
Interviewer	There is a kind of anticipation that something is going on, but it doesn't sound as if they are scared of the process.
Participant	No, they are not scared about it because, like today we had a meeting – just us – early in the morning and then there was the briefing you know, and a meeting again, so now when I came back they said: "Are you going to be able to do the team coaching now, because three meetings today?", so I said: "No, after all team coaching makes me relax, so I'll be fine."
Interviewer	It sounds as if team coaching also energizes you.
Participant	Yes

Interviewer	So it's not stressful, it makes you relax.
Participant	Yes. And in fact the following day you are just energetic because after you've relaxed, you know.
Interviewer	Ok, so it's kind of revitalizing?
Participant	It is. (Laughing)
Interviewer	You have spoken about how team coaching assisted you. You went through a process of finding out who you are, you became more open and that spilled over to other people as well, even people reporting to you are seeing there is something going on and that triggers their curiosity. In terms of your team relations, you've become more united and you take collaborative responsibility and address things collaboratively. Anything else that you can think of that you didn't say or might like to add?
Participant	Um...(Silence) What else...?
Interviewer	If you do think of something that you would like to add you are welcome to write a letter, or e-mail it to me.
Participant	Ja, I don't know...because even with the...when you have problems with the family or the kids you know, they helped me. Because I remember one time I had a problem with my son but it was ok, and then this time you know, my friend said to me she doesn't know how I deal with this because my son took the car – he said he was just going to the club thing – the next thing he was in Mbabane and there was no water, because I don't know what happened to the water tank and you know, so the car was broken. I was expecting to come early in the morning, we packed our bags because we were supposed to go to Mbabane in the morning but we were supposed to take the car to the garage because it had a problem. And then he phoned and says: "I'm in Mbabane, the car is stuck here" you know. So when he came back he decided to drink so I don't... So when he came I phoned my cousin and asked to just come pick us up because we had to go, so when he came he was sitting with my friend and his eyes were just red because you can see he never slept. And then I told him to just go to bed and sleep because he can't drive like that, but he said he wasn't driving because he came with someone else. Then afterwards my friend asked me how I managed because she would have been screaming and mad, and I said: "No, I have to talk to him afterwards when he is sober and ok. Not now, otherwise we won't understand each other and I just...because what I am going to say to him I want him to hear it and understand it and we must understand each other. This is not the time. Let's deal with the problem, go to Mbabane



	because I know he will be sober. He can't be like this every day." He was just doing it to avoid me being angry. (Minimal verbal response: Interviewer) So it...other times I would just say: "What! My car!" and I would have shouted but it has helped me manage my anger. I could... Then days went by and he thought it was finished and then I called him and sat him down and said: "Let's talk. On this and this day what happened?" (Laughing) So it helped. And then that lady said: "I like the way you handle things."
Interviewer	So it not just had a spin off in terms of your work but personally as well. You were able to do things differently, manage your anger, (Affirmative response: Participant) communicate more effectively with your son.
Participant	Yes...(Silence) I think that's it. If I do remember something I will just write it down.
Interviewer	Thank you very much for your time and for sharing your experiences.

### **TRANSCRIBER'S REFLECTIONS**

I think this was a challenging interview both for the interviewer and participant as the participant found it difficult to express herself. She did however place emphasis on the fact that team coaching has aided her in opening up towards other people and the fact that it contributed in forming unity amongst the team.

She found value in learning how to communicate better with colleagues and have thus grown in her relationships. She also found that the team coaching had a positive effect on her relationship with her son in they way they could now communicate and have mutual understanding of each other.

# Appendix 7.7

## Transcriber reflections



# **Transcriber reflections**

## **INDIVIDUAL QUALITATIVE INTERVIEW ONE**

Listening to the interview I could hear the absolute believe and gratitude that the participant has in team coaching. It is also very clear what a difference the coaching has made not only in her own life, but also the lives of the other staff members and essentially in the life of the company. Value has been added to these people's existence through the consistent support they receive from team coaching and the passion for their work has been restored.

The vital elements they learned during team coaching will surely be a great source of knowledge for the duration of their lives in whatever they decide to do and the confidence she obtained during the sessions is remarkably precious and has eternal value.

## **INDIVIDUAL QUALITATIVE INTERVIEW THREE**

I think this was a challenging interview both for the interviewer and participant as the participant found it difficult to express herself. She did however place emphasis on the fact that team coaching has aided her in opening up towards other people and the fact that it contributed in forming unity amongst the team.

She found value in learning how to communicate better with colleagues and have thus grown in relationships. She also found that the team coaching had a positive effect on her relationship with her son in the way they could now communicate and have mutual understanding of each other.

## **INDIVIDUAL QUALITATIVE INTERVIEW FOUR**

The participant spoke very passionately about the positive effect team coaching has had on her personal life and work environment. She also repeatedly mentioned the fact that team coaching assisted the team in realizing their weaknesses and strengths and the respect they learned for each other.

I think that team coaching has had a tremendous effect in establishing values amongst the team members, such as understanding, respect, positiveness and communication.

# **Appendix 8**

**Phase Three: Samples Of Multiple Data Collected During The Expert  
And Auto-Ethnographic Programme Valuation And Refinement**

## **Appendix 8.1**

**Completed naïve sketches from the expert stakeholder group**



# Appendix 8.1

Completed naïve sketches from the expert stakeholder group



# EXPERT STAKEHOLDER VALUATION: SAMPLE ONE

Appreciative inquiry, the theoretical framework against which the programme was implemented, suggests a *valuation*, rather than an *evaluation*.

1. The programme worked because it was designed in such a way that the participants experienced it as being *affirmative* (of their strengths), and *generative*: the positive energy that was generated by the programme broadened their thinking (Fredrickson, 2003) which in turn generated new learning. Moreover, the programme was successful in the sense that it has built (Fredrickson, 2003), the participants' sense of being a strong, cohesive team able to sustain their performance. The candidate/coach managed to create and maintain an appreciative environment "conducive to mental health facilitation", because appreciative communication and sense-making were skillfully encouraged.
2. The candidate had the insight to recognize the value of appreciative inquiry for enhancing coaching long before Orem, Binkert and Clancy (2007) had their book on appreciative coaching published. Moreover, she realised the value of appreciative inquiry's principles as the foundation for implementing the programme. It seems that these principles guided the candidate/coach to introduce a programme rich in methods and techniques that collectively opened up possibilities for positive change.
3. The originators of appreciative inquiry have never demanded formal training or certification for practicing this positive approach to development and change. They, in fact, encourage innovative interpretations and applications thereof – which the candidate/coach has done. Having stated that, I nevertheless am of the opinion that the programme can be enhanced by the choice of an affirmative topic, as starting point (framed specifically in terms of appreciative coaching). To be followed up with an interview guide consisting of generic and topic specific appreciative, unconditionally positive, questions. When this guide is used for interviews in pairs, a multitude of positive stories based on positive experiences are shared, from which the team's positive core is discovered. A shared sense of their positive core (grounded in lived experiences) should enable the participants to envision a healthy future for the team members and their organization. With this positive image in mind they should be able to enact it in an innovative way (Cooperrider, 2005) embarking on a journey of becoming

skilled improvisors, able to sustain performance. I would like to challenge the candidate/coach to combine both the implementation and team formation into a single appreciative coaching process. Orem et al. (2007) may serve as an example. This does not imply that the other techniques, methods or interventions used for the current programme, should be excluded.

4. For a future M&A coaching intervention I would suggest that during the discovery phase members from the one organization should interview members of the other organization (i.e. every interview pair should have a representative from each of the two merging organizations). It is then for each interviewer to discover, by means of the appreciative questions, what is strong and working well in the *other* organization. These themes should be documented on flip chart paper, visible to all. Subsequently all participants should democratically vote for those strengths and positive qualities, originating from both teams and organizations, that would be of the greatest advantage to the newly merged organization, envision what their common future would be like should the new collective be guided by this new “positive core”, what should be designed to sustain it, and what actions should be taken for a destiny of optimal performance.

## References



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# EXPERT STAKEHOLDER VALUATION:

## SAMPLE TWO

Complete a naïve sketch based on the questions below.

1. *Reflect on your experience of the programme as an expert evaluator. What do you think contribute to the worth of the programme (what work)?*

I would offer some basic principles of adult education as a way to understanding “what worked”:

- i. The time and outcomes were perceived as personally relevant to the members of the group.
- ii. They have the expectation of a positive outcome (at least positive to them, if not both to them and the organization).
- iii. They realized during the event of the contact sessions that they were able to do (a sense of efficacy).
- iv. The expertise and inputs of the coaches were seen as useful and desirable to their outcomes and to them as people.
- v. The group members could contribute definitively to the outcome of the contact session and the overall process of the coaching (Kolb’s work on the value of personalized goal setting).
- vi. The members in the group co-regulated the material, content and tempo of the process.
- vii. The coaches passed the numerous tests of their authenticity (including how they managed the process when questions were asked, differences of opinion, skepticism, not for being convinced, dealing with contrary reference experiences, etc) as being genuinely interested and the outcome is, as stated, of mutual benefit.
- viii. The perceived safety (based on the reading of authenticity) was high and allowed members to feel safe with each other as well since the managing of the process was in the hands of authentic and capable coaches.
- ix. The information inputs allowed for comfortable personal absorption, processing, validation and application.



2. *What do you most value about the programme?*

When it worked the mutual magic that happened between coaches and members of the team. Both felt a sense of achievement when saying goodbye.

3. *If you had wishes to enhance the worth of the programme, what would they be?*

The demand on the resourcefulness of the coaches are every minute of the contact, with (ideally speaking) no slippage ever (no excuses either for loosing one's temper and/or blaming the group), which is why the expensive luxury of 2 coaches. The integrity and authenticity of the coaches could also be about accountability to each other, rather than a conspiracy and to give each other permission to be "against" the group.



# Appendix 8.2

## Auto-ethnographic naïve sketch



# **Auto-ethnographic valuation of a M&A team coaching programme to facilitate the mental health of managers for sustained performance**

Complete a naïve sketch based on the questions below.

- 1. Reflect on your experience of the programme as the researcher. What do you think contribute to the worth of the programme (what worked)?**

The orientation programme created learning space for personal, collective and organizational transformation needed for company culture integration. Managers had a positive experience of programme participation because they felt valued and respected as human beings. The Appreciative Inquiry approach fostered the “Freedom to be Positive”, as stated by Cooperrider (in Whitney & Trosten-Bloom, 2003:xi). On a relational level managers’ experienced a sense of belonging – firstly in their relationship with each other as a management team, secondly in their relationship with important company stakeholders and lastly in their relationship with the team coaches. They gained important knowledge regarding the company’s strategic intent, ways of working and organizational culture. Personally, I witnessed a growing sense of motivation and commitment to each other as a team and the company as a whole. I think the visible inclusion of the Chief Executive Officer in the orientation programme worked. The team blossomed when they felt accepted in this relationship.

The input of the Director of Organisational Development and other company stakeholders in the initial refinement activities of the M&A orientation intervention and later the M&A implementation intervention assisted me in my role as the primary programme agent. I entered the business context with limited experience and using a diversity of perspectives assisted me to expand my understanding about organizational issues. Obtaining an accredited coaching qualification added to my confidence as a team coach. I learned to speak the business and coaching language more fluently and more authentically. It also assisted me to expand my coaching toolkit in an innovative way. I suppose I could be more in control of the outcomes achieved, with less chance of being “randomly successful” (Kruger, 2006).

My relationship with managers worked. This relationship was built on mutual trust and respect. I believed in their potential to succeed. As time progressed, the relationship shifted to a level of higher authenticity. I became more confrontational and the process was more outcomes driven. Managers learned to respond to organizational needs in a timely fashion and improvement in operational execution was evident. My relationship with the team grew from a position of an outsider to one where I perceived myself as an insider taking part in social responsibility activities. I formed close bonds with managers and supporting staff. I shared in their personal joys such as the birth of a new baby, the graduation of children or achieving a personal goal. Also in terms of meeting operational goals. I cared about their daily concerns, losing another family member, having to feed children that were left orphans. Ultimately, a company stakeholder perceived my relationship with the team as “too emotionally involved”. This perception raised awareness of the dynamic nature of relationships in the triangular coaching relationship. It further provided opportunity for self-reflection, leaving me with the question, was I emotionally too involved? Obviously, my first instinct would be to deny this allegation. I therefore rather take a reflexive stance asking: ‘How could I have managed the power dynamics in the triangular coaching contract more efficiently?’

My relationship with the co-coaches worked. I learned a lot about myself in my relationship with both Annie and Jeanette...my biggest lesson was probably to take less control, to celebrate different perspectives and to operate from a position of cooperation instead of competition. I loved our reflective conversations. It heightened my self-awareness as a coach and contributed to improved professional coaching practices.

I think our ability to tolerate ambiguity was probably our best attribute in this setting. Also, to stay true to our core values ultimately. Reflecting back, I know that I have grown not only in the comfortable and safe relationships that I encountered during my engagement in this programme, but also in the challenging one's. As a team coach I needed a context of safe relationships however to nurture my “Freedom to be Positive” or as one of the respected external stakeholders once said – to be a “good news junkie”.

The structure and flow of the programme worked. The first stage of programme implementation was guided by the findings of the situation analysis. I conducted the situation analysis in cooperation with the co-coach to establish programme applicability and to elicit the interests of the management stakeholder group specifically. It assisted us (team coaches) to gain a better understanding of the organizational context. The second stage – the M&A team coaching intervention through team coaching – was guided by the knowledge and insights that

we obtained during the first stage of programme implementation. The coaching cycle, methods and tools worked. It created a shared personal, individual and organizational learning, ultimately resulting in the achievement of the programme destiny, namely facilitation of managers' mental health within a context of company culture integration to ignite sustained performance.

My study supervisors visited the research context once a year, spending a weekend at the hotel in Swaziland. That worked for me. I felt that they were truly interested in this endeavour and that they cared about the people involved in the process, including the co-coach and myself. They provided valuable feedback as external witnesses to the programme process from an appreciative stance.

## **2. What do you most value about the programme?**

I value the relationships that I formed during the three years of programme implementation the most. My relationship with the co-coaches, the managers and the rest of the staff that worked in the hotel in Swaziland, as well as with other stakeholders involved in this process. I met amazing people who assisted me to strive to be "the best version of myself" in different settings (Kruger, 2006). I left the context, yet the context and the people have not left me. I am infected by what I have learned and live these lessons consciously in my endeavour to make a contribution to organizational transformation whenever I can.

## **3. If you had wishes to enhance the worth of the programme, what would they be?**

I wish I had a better understanding of the Swazi culture when I entered the setting. A deeper knowledge of managers' cultural practices and beliefs would have aided me to understand certain behavioural practices better, such as managers' initial unwillingness to confront managerial issues or to have team coaching on Saturdays because of family obligations. I wish I felt more appreciated in my relationship with the company stakeholders. Personally, I believe that the programme succeeded in achieving its destiny to facilitate managers' mental health. Programme participation assisted them to grow in confidence, to be a more cohesive team and to execute operational goals more consistently. The intent of appreciation is visible in some executive strategies, such as celebration rituals, investment in ongoing coaching and employee recognition activities. Yet, I wish that the company culture displayed a more congruent appreciative approach as evidenced by its way of being. I wish for a less conflicting relationship between the management team and the General Managers. The findings of the research indicate that power struggles between the management team fuelled the three "R's –

resentment, resistance and revenge”, ultimately influencing performance patterns in a negative way. Data and personal engagement in this context have convinced me that the interplay between external environmental demands and internally driven survival strategies of stakeholders involved in this intervention interfered with authentic company culture integration in the end, raising an important question regarding the long term programme sustainability in this context. I wish I had external professional coaching supervision. The company provided internal group supervision opportunities. I benefited from these opportunities in terms of professional development. On a personal level, I think it is crucial to engage in a coaching supervision relationship where relationships of power do not interfere with effective learning. Lastly, I wish that I was able to integrate Appreciative Inquiry more efficiently during the M&A implementation intervention in the context of the company. I believe as a team coach I predominantly succeeded in living the principles of Appreciative Inquiry, but I lacked knowledge and experience regarding the practice thereof. Additionally, the coaching mandate of the company had specific coaching requirements that did not consistently fit this approach.

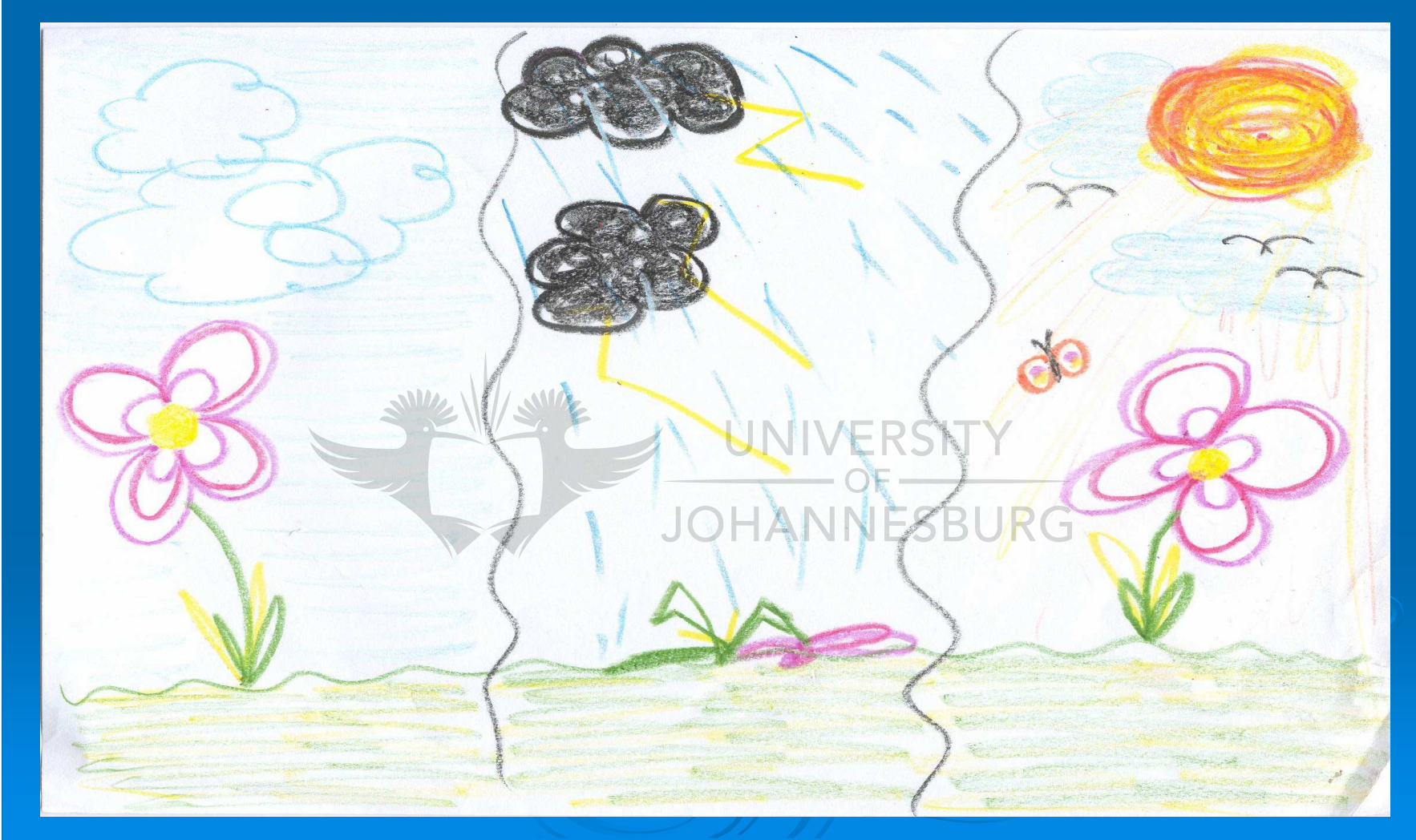


# Appendix 9

Copy Of A Drawing Representing The Former M&A Change



Appendix 9 Copy of a drawing of the lived experience of a manager of an M&A change process (Visagie, 2002:146)





# Appendix 10

## Letter Of Language Editor





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