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Information Technology Outsourcing Strategies to Ensure Customer Satisfaction

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The Office of the Provost

Walden University
2019

Abstract

Information Technology Outsourcing Strategies to Ensure Customer Satisfaction

by

Clyde Rajack

MBA, Queens University, 1998

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

October 2019

Abstract

Many information technology (IT) outsourcing initiatives fail, resulting in a high

impact on business results and customer satisfaction. Without effective strategies,

business leaders who outsource their IT services are at considerable risk of failure and

stakeholder dissatisfaction. The purpose of this multiple case study was to explore

outsourcing strategies that IT managers in Southern Ontario, Canada, used to ensure

customer satisfaction. Participants included 9 executives with experience in complex IT

outsourcing initiatives. Stakeholder theory and transaction cost economics theory were

the conceptual framework for the study. Data were gathered using semistructured

interviews to query 8 topical areas including IT outsourcing reasons, challenges, and

successful solutions. Data analysis using thematic analysis revealed 4 themes: strategic

intent for outsourcing, applicable frameworks, risk awareness, and partnership

strategies. Key findings included the importance of clients' and suppliers' focus on

deal principles, innovation, and work-collaboration strategies to enhance performance

and customer satisfaction. Information technology managers' application of the

findings of this study may improve business success and contribute to positive social

change by revitalizing the clients' and suppliers' economies to create job opportunities

and improve the quality of lives of employees and their communities.

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Dedication

This dissertation is in memory of my parents and to my inspirational family for their full unmitigated support during this enriching journey.

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Section 1: Foundation of the Study

Business leaders use Information Technology Outsourcing (ITO) as a strategy for companies to control costs and achieve a competitive advantage (Mann, Folch, Kauffman, & Anselin, 2015). Company leaders who outsource Information Technology (IT) services may face significant cultural, economic, and governmental obstacles that may result in outsourcing failure or poor results (Kleist, Woszcynski, Zafar, & Dembla, 2015). This study offers insights into effective ITO strategies that may allow a company to realize expected ITO benefits, success, and customer satisfaction.

Background of the Problem

The term *outsourcing* emerged in the United States in the late 20th century; outsourcing was prevalent in the manufacturing sector and transitioned to the IT sector in 1989 after a landmark contract between Eastman Kodak and International Business Machines Corp (IBM) (Solli-Sæther & Gottschalk, 2015). Outsourcing refers to the transference of activities or processes to external providers at domestic (onshore) or international (offshore) locations (Dekker & Koster, 2018). Company leaders deploy ITO as a compelling strategy to contract out IT activities to nearshore or offshore locations (Khan & Khan, 2017). Khan and Khan (2017) found that (a) failure to manage client expectations, (b) lack of vendors' capabilities, and (c) poor outsourcing relationships were critical factors that led to outsourcing failures. Consequently, a business need exists for IT managers to formulate effective ITO strategies to ensure customer satisfaction and realize the benefits of outsourcing.

Problem Statement

While ITO has many benefits, statistics on ITO risks are that failures are abundant (Dhillon, Syed, & Sá-Soares, 2017). Delen, Peters, Verhoef, and van Vlijmen (2016), in a study representing 700 ITO deals, found 40% failed, resulting in lost benefits and customer dissatisfaction. The U.S. imports of Information and Communication Technology (ICT) services in 2014 was $47.8B (Grimm, 2016), and worldwide ITO revenues in 2017 was approximately $64.3B (Statista, 2018). A 40% ITO failure rate is significant and infers a risk of approximately $25.7B. The general business problem is that without effective business strategies, IT managers who outsource their services are at considerable risk of failure and customer dissatisfaction. The specific business problem is that some IT managers in Southern Ontario, Canada, lack ITO strategies to ensure success and customer satisfaction.

Purpose Statement

The purpose of this qualitative multiple case study was to explore what ITO strategies some IT managers in Southern Ontario, Canada, used to ensure success and customer satisfaction. The target population for this study was IT Managers with ITO experience with large for-profit organizations in Southern Ontario, Canada, who outsourced their IT services, in whole or in part. IT managers may use the findings from this study to make better ITO decisions, achieve business success, and improve their outsourcing experience. The implications for positive and social change may include acquisition of ITO knowledge to help IT managers achieve customer satisfaction, while from a global perspective, help improve the living standards of marginalized employees

of offshore suppliers who deliver services to the client organization.

Nature of the Study

Researchers in the field of management use one of three research methods: qualitative, quantitative, or mixed methods (Bazeley, 2015). A quantitative method is a deductive numerical approach that researchers use to seek high response rates from participants with common characteristics, and to ascertain through hypothesis testing whether participants' responses are true and exact (Murphy, Klotz, & Kreiner, 2017). I did not select the quantitative method because I did not intend to focus my study exclusively on numerical explanations.

A mixed methods approach integrates both quantitative and qualitative approaches in the same study (Molina-Azorin, Bergh, Corley, & Ketchen, 2017). The mixed methods approach was not suitable for this study because mixed methods include quantitative inquiries. A qualitative research method is an inductive and practice-oriented approach that researchers use to perform in-depth explorations of a particular phenomenon (Nielsen, Mitchell, & Nørreklit, 2015). Hashemi-Ghasemabadi, Taleghani, Yousefy, and Kohan (2016) concurred with Nielsen et al. (2015) and recommended that researchers use a qualitative method to interactively probe participants' responses during the interview process, to achieve a deep and timely understanding of their lived experiences and perspectives. Of these three methods, a qualitative approach provided the best alternative to explore the IT phenomenon of the central research question for this study.

In contemplating the approach to qualitative research design, I considered

phenomenological, ethnographic, and case study designs. Phenomenological researchers seek to understand how humans experience life from a relativist and single entity perspective (Lamont, Kennelly, & Moyle, 2014). A phenomenological research design did not apply because the intention of this study was to focus on companies' ITO strategies and not on how humans experience life from their circumstantial perspectives. Ethnographic researchers investigate beliefs, behaviors, and broad understandings of social and cultural groups (Lewis, 2015).

An ethnography design did not apply to this study because ITO decision-makers work across multiple industries and were not part of any specific social or cultural group. A case study design encompasses a full repertoire of experiences and evidence including interviews, documents, artifacts, and observations (Yin, 2014). In a single case study, researchers draw participants from one organization, and in a multiple case study, researchers investigate multiple organizations to understand a phenomenon (Yin, 2014). Therefore, a qualitative multiple case study design was appropriate to this study to conduct in-depth explorations of ITO strategies and decision-making.

Research Question

The central research question for this study was: What ITO strategies do some IT managers in Southern Ontario, Canada, apply to ensure success and customer satisfaction?

Interview Questions

The interview questions for this study were as follows:

1. What is/was your role, responsibility, and involvement with outsourcing of IT services?

2. What specific IT services are / were you involved with in the decision-making process?

3. What were the processes, frameworks, or methods used to determine what specific IT services to outsource?

4. What were the reasons for outsourcing these services?

5. What specific processes were put in place to select the outsourcer/vendor organization?

6. What was successful about outsourcing the IT services, in terms of customer satisfaction, and other performance indicators?

7. What challenges did you face in outsourcing the IT services?

8. What more information can you provide that will help other IT managers successfully outsource to ensure customer satisfaction?

Conceptual Framework

Stakeholder theory (ST) was the main theoretical basis with transaction cost economic theory (TCE) as the supporting but inseparable theory for this study on ITO strategies to ensure success and customer satisfaction. Researchers' use of ST is trending upwards with the view of outsourcing as strategic instead of tactical (Giunipero, Bittner, Shanks, & Cho, 2018). In 1963, researchers at Stanford Research Institute (SRI) introduced the word *stakeholder* (Strand & Freeman, 2015).

Edward Freeman contributed to the concept of ST, arguing that a company must

account for stakeholders' considerations as part of the strategic planning process to achieve a competitive advantage (as cited in Harrison, Freeman, & Sá de Abreu, 2015). The ST refers to strategies and ideas that a company's interest group bring forward for management to consider, develop, and implement with the objective of maximizing benefits to the company's stakeholders (Strand & Freeman, 2015). Freeman defined stakeholders as any group or individual with an interest in the processes and outcomes of a company, and upon whom the company depends to achieve its goals (as cited in Harrison et al., 2015). Stakeholders include customers, employees, suppliers, vendors, financiers, and other parties who have an interest in a firm (Harrison et al., 2015).

Ketokivi and Mahoney (2016) advocated TCE as a positive and constructive form of stakeholder theory. Coase (1937) defined TCE as the cost of providing goods and services through market transactions instead of producing them within a firm, to lower costs and increase profits. In the field of IT, acquiring technology services through third parties is the essence of outsourcing where transactions are complex, and the stakes are high (Ketokivi & Mahoney, 2016). In a study on the impact of IT investments on a company's performance, Guerreiro (2016) concluded that management should moderate their outsourcing decisions through ST. The concept of ST inclusive of TCE, links directly to ITO strategies because companies typically outsource for lower costs, and key stakeholders may not support an ITO decision without their direct involvement.

Operational Definitions

Backsourcing: Backsourcing refers to functions and tasks that management previously outsourced and decided to repatriate in-house; backsourcing may also mean to

move services from a distant location to a local site (Solli-Sæther & Gottschalk, 2015).

Captive offshoring: Captive offshoring refers to a company moving IT activities from their domestic location and performing them at one of their locations or subsidiaries located in a foreign country (Mykhaylenko, Motika, Waehrens, & Slepniov, 2015).

Information and communication technology services: Information and communication technology services facilitate information processing and communications, as well as telecommunication services, computer services, and charges for use of intellectual capital associated with computer software (Grimm, 2016).

Insourcing: Insourcing refers to management's decision to reintegrate within the company, an activity they previously outsourced to an external supplier (Cabral, Quelin, & Maia, 2014).

IT Offshoring: IT Offshoring refers to service providers or vendors from developing and newly industrialized countries who provide a wide range of IT services to clients located in developed countries (Ambe, Brereton, & Rittenbruch, 2016).

IT Onshoring: IT Onshoring, also onshore outsourcing, or domestic outsourcing, involves IT vendors or suppliers who perform clients' work within the same geographical boundaries as the client organization (Baier, Rammer, & Schubert, 2015).

IT Outsourcing: IT Outsourcing is a business practice which entails the turning over of all or part of an organization's IT functions and related processes to a vendor to achieve benefits of cost reduction, scale economies, and increased competitiveness (Muka & Marnewick, 2018).

Outsourcing: Outsourcing is the transfer of activities or processes to external

providers at different locations domestic or international (Dekker & Koster, 2018).

Transaction costs: Transaction costs include the cost of searching, negotiating, and contracting with vendors as well as monitoring service-level agreements (Yigitbasioglu, 2015).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are an integral part of a study which researchers delineate to direct their inquiry, as well as analyze and alert the researcher to the dangers of not addressing these assumptions (Collins, Connor, Ferri, Gallagher, & Samson, 2016). Researchers state assumptions with the understanding they are true although the researchers may not substantiate the assumptions with material evidence (Ellis & Levy, 2009). The assumptions for this study were as follows: (a) participants provided comprehensive answers to the best of their ability; (b) participants were truthful and sincere in their answers; (c) participants provided accurate recollection of their ITO decision-making strategies; and (d) during qualitative data collection, participants provided full cooperation to queries to uncover biases. Uncovering of biases improves the credibility of the research findings, and identify areas for further studies (Gregory, Whyte, & Austin, 2016). To assist the participants with their preparation, and in support of these assumptions, I provided the consent form and interview questions to participants in advance of the information collection process.

Limitations

Limitations are potential flaws and weaknesses in a researcher's design and

methodology (Collins et al., 2016). Limitations are situations which the researcher cannot control and may threaten the validity of the study; researchers delineate limitations to help safeguard against inadvertent transferability of their results (Fusch, Fusch, & Ness, 2017). According to Malterud (2016), the number of participants may not be enough to support generalizability of findings and conclusions. Nine experienced ITO executives in Southern Ontario, Canada, participated in this qualitative multiple case study, however a wider geographical coverage and a mix methods approach may support the generalizability of the findings. Yamamoto and Olson (2016) stated that executives' time to answer research interview questions may limit the amount of critical information to probing questions. Executive time for interviews, follow-up questions, and member checking was limited to one and a half hour. Some IT executives could not provide internal documents, or artifacts due to confidentially concerns and protection of intellectual capital.

Delimitations

Delimitations refer to the bounds or scope of a research study which may affect the results and validity of the study (Moura, Garcia-Alonso, & Salas-Olmedo, 2017). Delimiters are conditions that fall within the research study as distinguished from those that fall outside of the study (Yin, 2014). The focus of this study was in the location of Southern Ontario, Canada.

Participants for interviews were IT managers and executives with at least 7 years of experience in ITO. The participants were knowledgeable on the use of ITO frameworks, the resulting outcomes, and impacts to customer satisfaction. The

participants were involved with large-cap companies that have outsourced services to
ITO suppliers. The scope of the ITO initiatives ranged from inception of the ITO
decision to at least 2 years following the transition phase.

<div align="center">**Significance of the Study**</div>

The purpose of this qualitative multiple case study was to explore what ITO
strategies managers in Southern Ontario, Canada, applied to ensure customer satisfaction.
Customer satisfaction is the most comprehensive measure of ITO success (Gonzalez,
Gasco, & Llopis, 2015). Information Technology outsourcing requires careful
consideration and due diligence to overcome political, economic, and government
challenges to be successful (Kleist et al., 2015). A successful ITO strategy may yield
strategic, economic, and technological benefits to companies (Gonzalez et al., 2015).
The ITO benefits include management's focus on core activities, reducing operational
costs, gaining access to technical capabilities, achieving success and customer
satisfaction (Sobinska & Willcocks, 2016).

Contribution to Business Practice

This study may contribute to business practices by helping companies achieve
ITO successes and improve customer satisfaction. ITO is a natural progression in the
continuum of an organization's maturing business model, allowing companies to achieve
proficiency with their operations and value chain activities (Jørgensen, Friis, & Koch,
2015). Mithas and Rust (2016) found that firms achieve higher revenues and profitability
when their managers invest in elevated levels of IT strategies. With a strong industry
trend towards outsourcing, this research study focused on ITO strategic decision-making

to help organizations achieve success and ensure customer satisfaction.

Implications for Social Change

The results of the study may have positive implications to social change through impact sourcing. Impact sourcing is an evolving trend in social modernization, helping marginalized communities in developing countries (Sandeep & Ravishankar, 2015). Cross-border service providers use information and communications technologies (ICT) to deliver digitally enabled services to client companies in the home country (Amit & Han, 2017).

Kannothra, Manning, and Haigh (2018) described these companies as impact sourcing service providers (ISSPs), who specialize in delivering low cost, high-quality services to companies in western nations. The ISSPs focus on their communities and their customer base (Kannothra et al., 2018). By implementing successful ITO strategies with ISSPs, managers in developed nations may realize higher company profits because of lower operating costs, while helping create employment and social benefits to offshore marginalized individuals.

<div align="center">

A Review of the Professional and Academic Literature

</div>

The issues and results from implementing ITO strategies may vary widely, including failure to achieve the results of a successful ITO strategy, and the benefits of customer satisfaction (Gonzalez et al., 2015). Khan and Khan (2017) conducted a systematic literature review of ITO contracts and discovered several critical challenges that either caused outsourcing failures or significantly compromised customer satisfaction. Khan and Khan found these significant challenges included the inadequacy

of an outsourcing plan, and failure to manage client expectations.

An ITO arrangement with an outsourcing company may have adverse effects not only to a company's financials, but to key stakeholders including customers, employees, suppliers, and communities (Nielsen et al., 2015). While Khan and Khan (2017) captured some of the key ITO risks and challenges, they have not addressed remediation of these challenges, leaving a significant gap in their study and areas for further research. In this study, I probed into the practices and rationale of IT managers in Southern Ontario, Canada, to understand the ITO strategies they employed, and the resulting impacts of these strategies on their customers.

To gather the information for this literature review I focused the search on recent prestigious peer-reviewed journals, between 2015 and 2019. Some references to the origin of the underpinning theories of this research, alternative theories, and their evolution may predate this 5-year period to coincide with the discovery dates by various theorists and researchers. To ensure extensive coverage of the literature review, I focused on searches using Google Scholar and electronic databases, including: *ABI/INFORM, ACM Digital Library, Business Source Complete, Computers and Applied Science Complete, Emerald Insight, IEEE Xplore Digital Library, ProQuest Central, SAGE Journals, Science Direct, and Taylor and Francis Online*. The key word searches for the study were *outsourcing*, *offshoring*, *global sourcing*, *foreign sourcing*, *outsourcing strategies*, and *customer-supplier outsourcing relationships*. Table 1 shows recency of publications and compliance of the literature review to DBA doctoral rubric, for a 2019 completion year.

Table 1.
Literature Review Sources

Literature Review Content	Total	Publication date within 5 years	% Total within publication date
Peer-reviewed Journals	75	72	96%
Book	1	1	100%
Non-peer reviewed Journals	1	1	100%
Total	77	74	96%

Figure 1 shows the theorical bases for the study, the latest trends and research in ITO strategies, and the spectrum of client-supplier relationships that may profoundly influence the success or failure of an outsourcing contract. Figure 1 also illustrates the linkages between ITO strategies and customer satisfaction and constitute the main topic areas of the literature review.
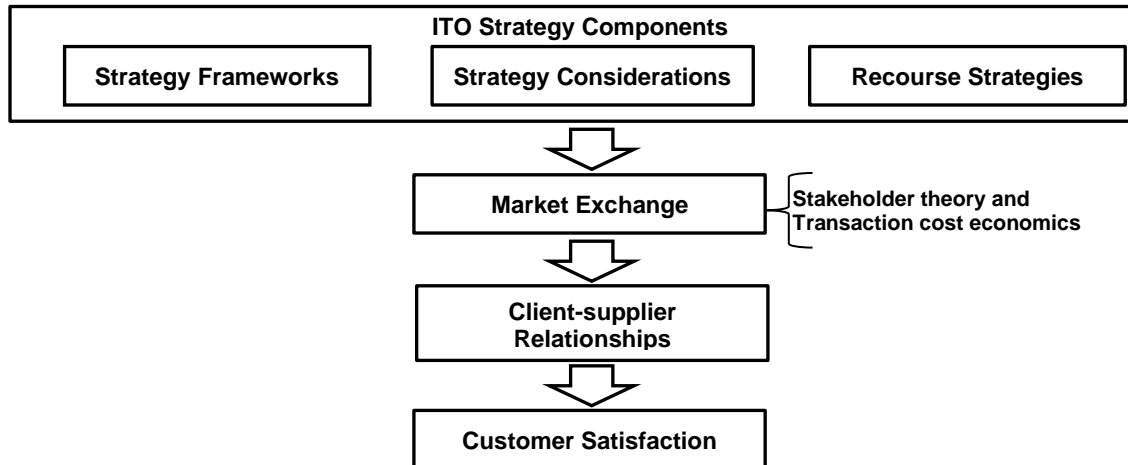
Figure 1. Literature review constructs. An illustration of the major subject areas of the literature review with supporting theories and client-supplier relationship dynamics.

Applicable Theories

There were two theories relevant to this research study. The underpinning concept of stakeholder theory (ST), along with a supporting but inseparable theory of

transaction cost economics (TCE) (Ketokivi & Mahoney, 2016). The ST and TCE both

apply to ITO strategic decision-making and involve customers and other stakeholders in

the decision-making process with the aim of ensuring customer satisfaction. Discussion

of these theories follows below.

Stakeholder theory. The ST originated in 1963 when researchers at Stanford

Research Institute introduced this concept in an internal memorandum; other notable

researchers Rhenman, Bowie, and Brennan contributed to the development of this theory

(Strand & Freeman, 2015). Ali and Abdelfettah's (2016) research into the history of ST

supported the origination and development of this theory; an extended progression and

seriation of the definitions of *stakeholder* is shown in Table 1. The most popular and

scholarly-referenced definition of the word stakeholder was that of Freeman (Strand &

Freeman, 2015).

Freeman defined a stakeholder as any person who can influence, or who is

influenced by the achievement of the company's objectives; stakeholders included

customers, employees, suppliers, vendors, and financiers (as cited in Harrison et al.,

2015). Freeman posited that management of an organization should consider the

concerns of their employees in the decision-making processes especially when faced with

challenging market conditions that threaten the long-term viability of the organization.

Employee participation in strategic decision-making enhanced organizational

performance (Pollanen, Abdel-Maksoud, Elbanna, & Mahama, 2017). In investigating

the successes or failures of ITO strategies, nine high-level participants with major

company's participated in strategic ITO decisions.

Table 2

A Chronology of Stakeholder Definition

Date	Researcher	Stakeholder definition
1963	Stanford Research Institute	Those groups without whose support the organization would not exist.
1964	Rhenman	Depend on the firm to achieve their personal goals and on whom the firm is dependent on for its existence
1971	Ahlistedt & Jahnukainen	Driven by their own interests and goals; they are participants in the company's objectives, depend on the firm, and whom for their sake the firm is dependent upon.
1983	Freeman & Reed	Can affect the achievement of an organization's objectives, or who are affected by the achievement of an organization's objectives.
1984	Freeman	Can affect or is affected by the achievement of an organization's objectives.
1987	Freeman & Gilbert	Can affect or is affected by a business.
1987	Cornell & Shapiro	Claimants who have contracts.
1988	Evans & Freeman	Have a stake or claim on the firm.
1988	Evans & Freeman	Those who benefit from, or are banned by, and whose rights are violated or respected by corporate actions.
1988	Bowie	Those without whose support the organization would cease to exist.
1989	Alkhafaji	Groups to whom the organization is responsible.
1989	Carroll	Has an interest to a right (legal or moral) to ownership or legal title to the company's assets or property.
1990	Freeman & Evan	Those who are contract holders.
1991	Thompson, Wartick, & Smith	Anyone who is in a relationship with the organization
1991	Savage, Nix, Whitehead & Blair	Have an interest in the actions of the organization and have the ability to influence decision making.
1992	Hill & Jones	Constituents who have a legitimate claim on the firm, established through the existence of an exchange relationship, and who supply the firm with critical resources (contributions), and in exchange expects their interest to be satisfied.
1993	Brenner	Have a legitimate non-trivial relationship with the organization such as exchange transactions, actions, impacts, and moral responsibilities.
1993	Carroll	Asserts to have one or more stakes in the business, maybe affected by or affect the company's business.
1994	Freeman	Participants in the human process of joint value creation.
1994	Wicks, Gilbert & Freeman	Interact with and give meaning to the corporation.
1994	Langtry	The firm is significantly responsible for their being or they hold a moral or legal claim on the firm.
1994	Starik	Can and are making their actual stakes known; are or might be influenced by, or are or potentially are influencers of the organization
1994	Clarkson	Bear some form of risk by having invested some form of capital, human, financial, something of value, or are placed at risk as a result of the company's activities.
1995	Clarkson	Have or claim ownership, rights or interests in a corporation and its activities.
1995	Näsi	Interact with the firm and thus make its operations possible
1995	Brenner	Anyone who could impact, or be impacted by the firm/organization
1995	Donaldson and Preston	Persons or groups with legitimate interest in procedural and/or substantive aspects of corporate activity
2002	Kaler	Claimants or influencers of a company's business.
2003	Phillips	Those to whom the organization has a moral obligation simply by being human.

Note: Adapted from "Towards a Theory Stakeholder Identification and Salience: Defining the Principle of Who and What Really Counts," by R. K. Mitchell, B. R. Agle, and D. J Wood, 1997, *Academy of Management Review,* 22, p. 858. Copyright 1997 by Academy of Management Review.

L. B. Nielsen et al. (2015) supported Freeman's concept of stakeholder theory and advocated for the inputs and observations from stakeholders in developing organizational strategies that may maximize a company's value and profits. Similarly, Harrison et al. (2015) emphasized that stakeholders' considerations should be a part of a company's strategic planning process to achieve a competitive advantage. Strand and Freeman (2015) shifted this definition from a *competitive* advantage to a *co-operative* advantage and defined stakeholder theory as management's ability to create superior value by cooperating with its stakeholders in formulating strategies that may help as many stakeholders as possible. Under the constructs of cooperative advantage (Strand & Freeman, 2015), collaboration among stakeholders is necessary for a firm to formulate strategies and conduct business transactions.

An executive decision to outsource IT services is strategic to a corporation, and one in which the ultimate effect could have detrimental consequences to stakeholders' interests (Elahi, Sheikhzadeh, & Lamba, 2014). To help reduce negative impacts to a firm, Guerreiro (2016) recommended that management should moderate their outsourcing decisions by involving key stakeholders in their decision-making processes to avoid risks of outsourcing failures. According to Ketokivi and Mahoney (2016), business exchange transactions are core to TCE and involve dealings between customers, employees, vendors, and other stakeholders. The linkages between stakeholders and their involvement in a company's decision-making process support Ketokivi and Mahoney's assertion that TCE is an extension of ST. These two theories apply to this study because clients and vendors engage in business-to business contracting for ITO services.

Transaction cost economics theory. Coase, the original theorist of TCE, proposed that an organization can acquire goods and services more cost effectively by purchasing instead of relying on internal production (Ketokivi & Mahoney, 2016). Coase (1937) defined TCE as the cost of providing goods and services through market transactions instead of producing them within a firm. Williamson enhanced Coase's theory and suggested additional costs to an exchange transaction may significantly increase the total acquisition cost of goods and services (Kivijärvi & Toikkanen, 2015).

Transaction costs vary from the production costs of creating goods and services; they include the cost of finding, negotiating, contracting, and administering resources to perform production work (Kivijärvi & Toikkanen, 2015). If a supplier's scale economies can compensate for transaction costs and the costs of the internal production, then a firm may achieve a cost advantage by purchasing from the market instead of producing them internally (Kivijärvi & Toikkanen, 2015). The concept of TCE is the very essence of ITO because TCE involves buying IT services from an external supplier at a cost lower than the company's internal costs for producing the same services. Schermann, Dongus, Yetton, and Krcmar (2016) meta-analysis and research into TCE found that while TCE has merit, a reexamination of this concept would be appropriate given the maturity of ITO over time, taking into consideration the costs of contract renegotiations, and other costs that may challenge the TCE framework in ITO strategic decision making. Other researchers have expressed similar views.

The concept of TCE is debatable as an appropriate basis for ITO because IT services are knowledge-centric and not product based (Aubert & Rivard, 2016). For

example, in software development projects, acquisition of business knowledge requires the ITO supplier to interact with employees of the client organization to gather requirements necessary to develop and support the client's software applications (Mishra & Mahanty, 2015). Aubert, Kishore, and Iriyama (2015) posited that innovation through outsourcing, and contracting are conflicting concepts. Schermann et al. (2016) argued that TCE has become an inappropriate framework because of the risk of reputational damage to suppliers whose services focus exclusively on cost containment and may compromise quality of service delivery.

Tebboune and Urquhart (2016) supported the transaction cost framework but instead of a pure cost reduction model posited that the framework should include other dimensions. Figure 2 considers the elements of asset specificity, behavioral certainty, and negotiation frequency, to determine the optimum way to manage transactions. Therefore, the model provides a path to help decision makers determine whether to outsource activities and manage the supplier through relational governance or keep the activities within the organization and manage them internally. Another case against pure cost models is contemporary developments in industry which brought to the forefront corporate goals of full transparency, disclosure, standardized services, and knowledgeable clients (Schermann et al., 2016). These corporate initiatives increased the scope of management focus from not only cost efficiency but value-creating relationships.
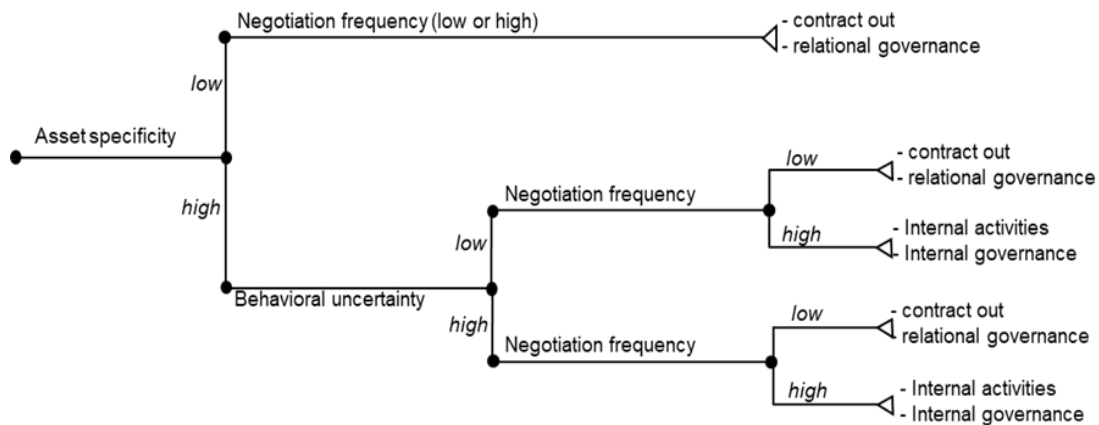
Figure 2. Transaction cost framework. Asset specificity: the degree of dedication to a specific purpose; behavioral uncertainty: level of trust between contracting parties; negotiation frequency: frequency of bargaining between contracting parties. Adapted with permission from Aubert el al., as cited in "Netsourcing strategies for vendors: a resource-based and transaction cost economics perspective," 2016, *Information Technology Journal, 31*, p. 34. Copyright 1996 by Benoit A. Aubert, Suzanne Rivard, and Michel Patry.

Alternative Theories

The investigation into alternative theories included resource base theory and agency theory. Resource based theory includes consideration of ITO decisions in relation to the strength of company's IT resources, the strategic advantage or disadvantage these resources may provide, and the risks associated with outsourcing IT services to external suppliers (Hitt, Xu, & Carnes, 2016). The focus of agency theory is on developing the most effective contract between a principal (client) and an agent (external supplier), ensuring the agent acts in the best interest of the principal. I will explain these theories in further detail below.

Resource based theory (RBT). Edith Penrose, an economics theorist, developed RBT on the premise that companies are diverse because of differences in their human resource capabilities (Hitt et al., 2016). Resource based theory postulates that a firm can achieve a competitive advantage by improving employees' capabilities and create

knowledge workers (Guerreiro, 2016). Knowledge workers exhibit exemplary

intelligence and confidence that can help build an entrepreneurial economy (Turriago-

Hoyos, Thoene, & Arjoon, 2016).

Knowledge workers have the capability to (a) innovate superior products, (b)

create customer loyalty, (c) attract new customers, and (d) increase a company's

profitability (Hitt et al., 2016). The goal of RBT is to create uniqueness in employees'

knowledge and abilities that are inimitable or irreplaceable (Hitt et al., 2016).

Knowledge in the context of RBT refers to technical knowhow, the application of which

creates a competitive advantage in technology innovation (Turriago-Hoyos et al., 2016).

Chuang and Lin's (2017) research into the performance implications of new IT

knowledge areas (e-services) found that RBT and innovation strategies were

complementary to IT service offerings. A company's investment and desire to protect its

intellectual capital suggest a preference for insourcing instead of outsourcing to a third-

party supplier who may disclose clients' secrets to rivals. Burvill, Jones-Evans, and

Rowlands (2018) emphasized that the worldview of RBT proponents is that development

and growth stems from within the firm, and the firm must possess varied amount of

resources and skillsets. An exploration of RBT, as applied to this research, was not a

proper theoretical basis because the fundamental basis of the RBT heavily favors

insourcing, and the belief that outsourcing to a third-party may expose the company to

the unnecessary risks of losing a competitive or cooperative advantage.

Agency theory (AT). Stephen Ross developed agency theory in 1973, addressing

the principal-agent behaviors and incentives in an agency relationship; Barry Mitnick,

another major theorist of AT developed a complementary theory focusing on the imperfections in agency relationships (as cited in Willcocks, Lacity, & Sauer, 2017). Willcocks et al. (2017) stated that an agency relationship exists when a person or organization (the principal) contracts another person or organization (the agent) to perform services on behalf of the principal. When goal incongruence exists between the principal and the agent, the principal may incur agency costs to continuously monitor the agent's performance, and assess losses emanating from the agent's inability to meet the principal's objectives (Willcocks et al., 2017).

In applying AT to an outsourcing arrangement, Bruccoleri, Perrone, Mazzola, and Handfield (2018) posited that information asymmetry inherent in an agency relationship may cause supplier (agent) misalignment, resulting in control deficiencies and suboptimal performance. In outsourcing arrangements where the agent takes responsibility for product and services offering on behalf of the principal, Reim, Sjödin, and Parida (2018) found that the probability of adverse customer behavior increased substantially because the agent assumed responsibility for delivering product quality and performance. These challenges may have negative consequences to a company's financial performance, requiring the principal to create strong relational governance.

Accurate monitoring and assessing of agents' performance are difficult and expensive propositions for principals to achieve because of power and information asymmetry; agents have access and control over their companies' resources and information which are not transparent to the principal (Lui, Ngai, & Lo, 2016). The Bosse and Phillips (2016) study of AT found that economic parties to an agency

relationship displayed significant self-interest behaviors based on their respective views of fairness which subsequently result in either positive or negative behavior. Prosman, Scholten, and Power (2016) explored the effectiveness of behavior-based methods including agent certification and information exchange to help discourage and restrain self-interest behavior. Prosman et al. found behavior-based methods to be effective with smaller suppliers, but ineffective with more powerful suppliers because of their self-interest patterns.

The divergence of principal-client interests inevitably incurs losses to society because businesses suffer from loss of revenues; this problem remains fundamental to repeated AT challenges (Bosse & Phillips, 2016). According to Siew-Chen and Vinayan (2016), compensation is a major consideration to motivate agents to act in the best interest of the principal and avoid opportunistic behavior. The AT is a similar arrangement to outsourcing because principals contract out their services to agents, however TCE promulgates market exchanges for lower costs and conflicts with Siew-Chen and Vinayan's findings of higher compensation to incents agents to act in the best interests of the principals.

An exploration of AT, as applied to this research, was not an applicable theoretical model because AT researchers Siew-Chen and Vinayan (2016), Bosse and Phillips (2016), and Prosman et al. (2016), inferred that AT focuses on the agent and does not delve into the full spectrum of risks associated with the client organization. A key drawback of AT as a sound theoretical model was that AT does not help in the understanding the strategic role of outsourcing in organizations and various outsourcing

practices (Willcocks et al., 2017). Furthermore, AT assumes that companies base their ITO decisions strictly on agency costs, without considering the interests of key stakeholders such as employees and customers.

Theory Analyses and Summary

In analyzing the above theories, there was no single theory sufficiently comprehensive to encompass the multifaceted intricacies of ITO strategies. The main theoretical basis for this research as ST, with TCE being a supporting theory. The ST emphasizes the importance of executive collaboration with company stakeholders in formulating strategies to achieve a competitive advantage (Harrison et al., 2015).

Customer satisfaction is an essential element of customers' perception of a company's competitiveness, and lead to customer loyalty (Baumann, Hoadley, Hamin, & Nugraha, 2017). Therefore, collaboration with key stakeholders may help executives understand the impact business strategies can have on customers satisfaction, and on the company's competitiveness. A successful ITO strategy with the appropriate client-supplier arrangements may bring significant value to employees, customers, and other stakeholders (Tjader, May, Shang, Vargas, & Gao, 2014). Some IT vendors have high technology specialization and may be able to provide better-quality products and services than the client's internal technology team. Another strategic advantage is that ITO allows the client company to focus on core business activities, explore new business opportunities, and increase market share (Tjader et al., 2014).

The secondary and supporting theoretical relevance to this research study is TCE. Traditionally, management used TCE as a decision tool to determine what operational

function they should outsource from a cost-savings perspective (Imbuga & Guyo, 2018). While cost-accounting analyses may help to determine make or buy decisions, TCE according to Ketokivi and Mahoney (2016), concerns the sustainability of a high-value client-supplier relationship that is advantageous to stakeholders to an exchange transaction. The TCE strategy may create a cost advantage, allowing a company to offer quality services at low costs if the supplier can provide a flexible pricing model (Chun-Lai, Espino-Rodríguez, & Baum, 2018).

The concept of a high value client-supplier relationship challenges the traditional cost-reduction rationale for outsourcing in which the objective is on cost reduction to the client, and cost containment to the supplier (Ketokivi & Mahoney, 2016). In business terms, a high-value relationship considers revenues minus costs, instead of a pure focus on lowering cost. A superior relationship can also support a company's efforts in improving its credibility, image, and gaining the trust of customers. The theories of high-value relationships, cost containment, executive collaboration with stakeholders, and customer satisfaction were key ingredient is the research study.

Information Technology Outsourcing Strategies

Lacity et al. (2017) reviewed 257 articles spanning 23 years of ITO research and concluded that firms strategically outsource their IT services to: (a) reduce cost, (b) access technical skills, (c) improve business performance, and (d) gain resource flexibility. However, Lacity et al. found that clients did not consistently achieve their ITO objectives for several reasons, including: (a) unclear requirements, (b) ineffective governance, and (c) inability to measure the suppliers' performance. Risks arise from

negative outcomes (Willcocks et al., 2017), and may result in significant economic losses (Lu, Bi, Huang, & Duan, 2017). Because risks begin at the inception of the ITO decision-making process, investigation of formal frameworks in this study may aid management in reducing risks and increasing the success of ITO decisions.

      Strategic Sourcing frameworks. As part of this study, an investigation into sourcing frameworks sought after information, insights, limitations, and impacts to advance successful ITO strategic decision-making outcomes (refer Figure 1). A simple strategy framework for outsourcing was that management may engage in a low level of outsourcing, or insourcing for any activity with a high competitive advantage, such as sales and marketing, and fully outsource those activities with a low competitive impact (Espino-Rodríguez & Ramírez-Fierro, 2017). One of the major limitations of ITO was the lack of research in ITO integrated frameworks (Jia, Orzes, Sartor, & Nassimbeni, 2017). The limited number of ITO frameworks provided opportunities for further research and insights that would enhance the ITO body of knowledge as part of this study.

      Jia et al. (2017) developed a corporate sourcing framework based on an analytical review of 52 prestigious peer-reviewed journals. Figure 3 illustrates the framework's basic constructs and consists of a global sourcing strategy component and a global sourcing structure. Mishra, Kumar, Sharma, and Dubey (2018) defined strategy as the practices and procedures management put in place to achieve a competitive advantage. According to Jia et al., the strategy part of the framework deals with management's specific sourcing goals, policies, and action.

Mishra et al. (2018) referred to structure as to how management organizes a company to achieve their strategic goals. The structural component sets out how management may design their organization to execute, manage, and control sourcing activities. Strategy and structure are foundational elements of a company to achieve their objectives, remain competitive, and provide higher quality services at lower costs to customers (Croitoru, Robescu, Stegaroiu, & Oprisan, 2018). Jia et al. (2017) posited that not only can the sourcing motives influence the structure of the organization, but once in place, the internal structure can influence the choice of outsourcing options. For practical implications, management may adopt this model in circumstances where little desire exists to delve into the intricacies of each component.
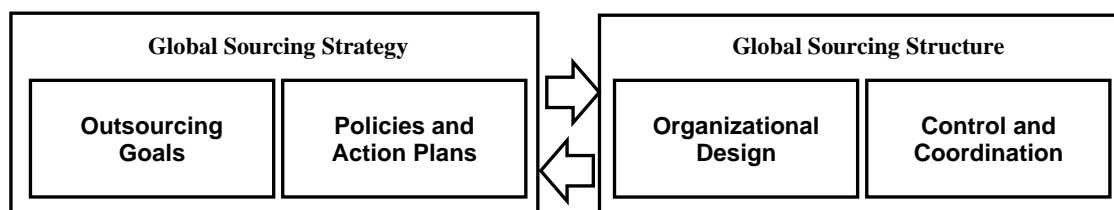
Figure 3. Global Sourcing Conceptual Framework. Adapted from "Global sourcing strategy; towards a conceptual framework," by F Jia, G. Orzes, M. Sartor, and G. Nassimbeni, 2017, *International Journal of Operations and Production Management, 37,* p.846. Copyright 2017 by Emerald Publishing Limited.

Jia et al. (2017) found that companies' primary sourcing goals consisted of cost reduction, improvements to resource capabilities, and pursuit of new markets. These goals are consistent with the strategic outsourcing objectives to improve a company's financial performance (Sanchís-Pedregosa, Gonzalez-Zamora, & Palacín-Sánchez, 2018). The policies and plans part of the framework consists of setting quality standards for product outsourcing, quantity requirements, and integrating the company's supply chain with worldwide sources (Jia et al., 2017).

Kasiri, Cheng, Sambasivan, and Sidin (2017) found that suppliers' compliance to quality standards positively impacted customer satisfaction, which in turn improved customer loyalty. In integrating a company's supply chain with third parties, the procurement staff must protect the interest of the company against the risk of outsourcers' self-interests in maximizing their own profits (Vaxevanou & Konstantopoulos, 2015). In formulating policies and action plans, management should identify all risks and take remedial when adopting and implementing this framework for their ITO decisions.

The organizational design part of the framework included the following factors: (a) the choice of a horizontal or vertical structure, (b) a centralized or decentralized allocation of decision-making power, and, (c) the degree of specialization to enable sourcing success (Jia et al., 2017). Regardless of management's preference for a vertical or horizontal organization design structure, the key objective was to facilitate high collaboration and participation (Ahmady, Mehrpour, & Nikooravesh, 2016). In a single case study involving several sourcing vendors, a horizontal structure provided high collaboration and synergies that gave rise to cost and quality benefits (Aubert, Saunders, Wiener, Denk, & Wolfermann, 2016). While a horizontal structure may not in all circumstances yield high collaboration, the choice of an organization structure should result in seamless integration and the best control of supply chain operations.

The Jia et al. (2017) study focused on large multinational corporations in the manufacturing sector for which there are aspects which may extend and apply to ITO. Borrowing theories and methods (Gregor, 2018), and the theory of borrowing strength

(Saultz, 2017) may apply to frameworks pertinent to ITO and the services industry. Examples of these theories include the integration of IT functions with the outsourcer to service the client company's customers with products and services and designing organization structures to facilitate effective coordination of work between the client and the outsourcer. The Jia et al. framework supports this study by providing the constructs for an outsourcing strategy and structure that may help in comparing and contrasting the participants' responses in exploring the central research question.

Another sourcing framework is by Tjader et al. (2014). Tjader et al. combined an Analytical Network Process (ANP) and Balanced Scorecard (BSC) framework to aid in the outsourcing decision-making process for the IT department of a major U.S.-based company. This framework used a nine-point scale ranging in criteria from *unimportant* to *extremely important*, to measure 17 criteria against four BSC subject areas: customer satisfaction, financials, internal operations, and employee earning and growth (Tjader et al., 2014). Modak, Ghosh, and Pathak (2018) concurred that these four key BSC perspectives may provide sufficient coverage for management's assessment of a company's business operations for ITO considerations.

The 17 criteria in the framework included three crucial outsourcing objectives: cost savings, customer satisfaction, and core focus (Tjader et al., 2014). Management using this model work with key stakeholders to identify business areas and criteria most relevant to their organization. Stakeholders score every criterion for each business area using a nine-point scale, then analyze and synthesize the scoring results to determine the best sourcing strategy which may be either outsourcing, insourcing, or forming a strategic

alliance with a supplier (Modak et al., 2018).

In applying this model, Tjader et al. (2014) found that customer satisfaction was the highest ITO priority and selected a sourcing alternative to minimize the risk of customer dissatisfaction. Tjader et al. cautioned against exposing customer information to suppliers who may share customer data with competitors. Modak et al. (2018) found that outsourcing to a third party resulted in a state-of-the art technical workforce with a higher level of productivity in a shorter timeframe. J. Lee (2017) posited that management should periodically evaluate their ITO strategies, considering whether expected productivity gains were sufficient to warrant insourcing or outsourcing. The above findings illustrate the relevance of my research study to explore ITO strategies essential to customer satisfaction.

Strategy considerations. Mykhaylenko et al. (2015) concurred with Tjader et al. (2014) on their criteria for strategic outsourcing, citing lower cost, innovation, and access to qualified technology skills. Rhodes, Lok, Loh, and Cheng (2016) found that strategic sourcing benefits in services industry included management's focus on business core capabilities, higher quality of service delivery, and improved flexibility of resources available to a firm. Mykhaylenko et al. argued for the inclusion of other factors management should consider when making strategic outsourcing decisions. These factors included: (a) suppliers' location advantages, (b) the services or functions to outsource, (c) the proper governance model to manage the company's relationship with suppliers, and (d) the choice between captive offshoring or offshore outsourcing. Captive offshoring are activities a supplier performs within the parameters of the company but

external to the company's headquarters (Baier et al., 2015). Management's consideration of these factors increased the rigor of the outsourcing thought process, improved the success of realizing the company's outsourcing motives, and reduced the likelihood of reshoring or expatriating services to the home location.

Activities to outsource. The discovery by Mykhaylenko et al. (2015) of management's emerging trend in outsourcing knowledge-based activities, was a departure from the traditional offshoring practice of offshoring noncore and simple activities to low-cost locations. Munjal, Requejo, and Kundu (2018) agreed with Mykhaylenko et al. and confirmed that organizations do not only outsource noncore work for efficiency advantages, but are moving to a new practice of outsourcing to foreign knowledge-based countries to access skills and resources, particularly in technology and professional services. Munjal et al. found that the main advantage of this strategy was organizations avoided ownership of the internal acquisition, development, retention, and succession processes for their internal resources.

Munjal et al. (2018) found this new strategy of best sourcing was prevalent with smaller, high growth companies where purchasing or outsourcing specialized skill, although more expensive, provided management with time and effort benefits to focus on core competencies and organizational performance. J. Lee, Patterson, and Ngo (2017) posited that companies with resourceful efficient employees are productive and positively impact customer satisfaction. Best sourcing or internal resourcing were areas discussed and as part of probing questions into participants' answers to the research question of this study.

The modern best-sourcing trend of outsourcing activities requiring specialized, capabilities which may differentiate a company in the marketplace, is the opposite of the traditional outsourcing doctrines of outsourcing non-core, and simple activities at lower costs (Mykhaylenko et al., 2015). Noncore and simple activities included program coding of information systems where skilled in-house personnel prepared detailed specifications, set quality standards, and contracted to offshore suppliers for product and services. Despite this emerging trend, Mykhaylenko et al. cautioned against the risks of outsourcing innovation, research, development and other company's strategic activities because of the potential of supplier's knowledge spillover to competitors. When knowledge spillover occurs, a firm may lose market advantage and suffer compromises to its customer base and profitability (Mykhaylenko et al., 2015).

Irwin et al. (2018) found that the more business leaders outsourced noncore activities, the greater the tendency to outsource core activities to gain greater access to technical knowledge. The practical implications of the findings of Munjal et al. (2018) and Mykhaylenko et al. (2015) supported the underlying principles of stakeholder theory and transaction cost economics, which are the theoretical bases for the research study. Management and stakeholders of the organization must consider the trade-offs, risks and performance benefits of whether to buy or outsource non-core services. Munjal et al. recommended considering the financial viability of the company, the size and stage of development, and the capability of resources available within the firm when making an outsourcing decision.

Location advantage. In considering the choice of a host location, Mykhaylenko

et al. (2015) suggested that management should focus on countries where the political and business ecosystems are stable and attractive to foreign direct investments (FDIs). López and Ishizaka (2017) recommended that the choice of location should include countries with a resilient technology infrastructure and secure connectivity capabilities. Locations with these characteristics appealed to skilled human resources with the competencies to help organizations at a strategic level (Mykhaylenko et al., 2015).

B. B. Nielsen, Asmussen, and Weatherall (2017) agreed with Mykhaylenko et al. (2015), and found these locations prone to high wages, high taxes, and high prices. In concurrence with B. B. Nielsen et al., Mykhaylenko et al. found that the United States, Scandinavia, and countries of Western Europe were expensive and not suitable to companies wishing to offshore activities for the principal reason of cost advantage. Mykhaylenko et al. also found that countries in the Far East and Eastern Europe had resources skilled in advanced levels of knowledge and technology, especially among firms with several years of outsourcing experience.

Suppliers in these regions provided higher value-added outsourcing services to multinational corporations, including research, development and innovation (Mykhaylenko et al., 2015). The findings from Mykhaylenko et al. (2015) and B.B. Nielsen et al. (2017) offered opportunities for researchers to understand the impact of free-trade agreements, tax-reliefs, and other cost mitigation strategies on high-priced, high-value outsourcing services in FDI-hosted countries. If new research findings support positive effects of these strategies on lowering outsourcing costs, firms may be able to benefit from lower costs of outsourcing to these regions instead of insourcing in

their home countries.

Strategic governance options. Another factor for management to consider in the outsourcing decision-making process is the choice of supplier governance model (Mykhaylenko et al., 2015). A company's outsourcing motive, degree of control over a supplier's performance, and the management style of the client-supplier relationship may determine the appropriate governance model management may adopt (Mykhaylenko et al., 2015). If management intends to penetrate new markets or access raw materials, they may adopt captive offshoring (Mykhaylenko et al., 2015). In a scenario where the client requires strong influence over the supplier as in captive offshoring, the critical success governance factors include organizational proximity, timely communications, and quality production capabilities (Ali, Hongqi, Khan, Zhongguo, & Liping, 2017).

In outsourcing of higher order services such research and development, Mykhaylenko et al. (2015) recommended management pursue offshoring to gain access to technology and knowledge-based resources. Oshri, Kotlarsky, and Gerbasi (2015) found that outsourcing to achieve innovation requires a high-quality client-supplier relationship. In an offshoring scenario, Ali et al. (2017) agreed with Oshri et al., that clients and suppliers should transition from a contractual relationship to trusted and collaborative partnership. According to the research finding above, the most effective governance model is for the client company and supplier to develop a mode of operation that supports trust, transparency and collaboration regardless of choice of location or outsourcing motive.

Outsourcing recourse strategies. Despite management's best efforts, an

outsourcing strategy may not succeed, leaving the client and the client's customers at significant risks. For instance, when an ITO supplier fails to meet the client's delivery expectations, the client may reverse their outsourcing decision, and consider reshoring, insourcing, or a combination as remedial strategies (Foerstl, Kirchoff, & Bals, 2016). Management's decision to outsource for the primary purpose of cost savings may consider reshoring as a remediation alternative (Solli-Sæther & Gottschalk, 2015).

Management may relocate outsourced operations near to their domestic location (nearshoring), within their domestic country (reshoring), or within their own company (insourcing) (Foerstl et al., 2016). When clients integrate the outsourced activities back into their firms, they have taken action to backshore, repatriate, and insource the services they previously outsourced (Foerstl et al., 2016). Both backshoring and nearshoring are reshoring tenets that reflect a change in physical geographical location from a distant offshore foreign country to a nearby location. In determining a backshoring strategy, management should consider the proximity to their marketplace for relocation to be successful (Johansson, Olhager, Heikkilä, & Stentoft, 2019). Backshoring and reshoring concepts are the reversal of management's original decision to outsource because of compromises to efficient business operations and the going concern of the company.

Foerstl et al.'s (2016) research into the management's motives for reversing their offshoring decisions uncovered several factors. These included (a) client-supplier distance that accounted for delivery delays and customer dissatisfaction, (b) flaws in cost assessments in the original decision to offshore, (c) management's biased decision making, favoring a supplier who influenced the client's decision-making process, and (d)

limitations in management's outsourcing knowledge. One of the difficulties in reshoring

production activities is the high capital costs of constructing new plants and production

facilities at nearshore or domestic locations (Albertoni, Elia, Massini, & Piscitello, 2017).

These prohibitive switching costs that exacerbate inventory delays and customer

satisfaction may place the client firm at exceptional risk of losing substantial revenues

and valuable customers.

Albertoni et al.'s (2017) findings are germane to companies' outsourcing

strategies particularly for product manufacturing or supply chain activities. Management

should consider the feasibility of cost-effective relocation of outsourced activities in the

event the outsourcer's performance becomes unacceptable and detrimental to the

company's operations. Management's reaction time to re-shore, if not prompt, may place

the client firm and their customers in financial jeopardy. As part of ITO strategies,

stakeholders' opinions on the implications and difficulties of reshoring or insourcing may

influence the type of services to outsource.

Management of some companies may not be able to reshore their operations.

Wiesmann, Snoei, Hilletofth, and Eriksson (2017) reasoned that capital barriers and the

absence of management knowhow may render reshoring unfeasible, thereby subjecting

the company to the effects of long-term adversities. Furthermore, Wiesmann et al.

argued that modern research suggested that reshoring may not contribute to western

reindustrialization because significantly more companies are offshoring than reshoring.

Wiesmann et al. (2017) recommended that the best barrier to reshoring is for

management to carefully consider the long-term effects of strategic offshoring prior to

deciding what and where to offshore. Hartman, Ogden, and Hazen (2017) suggested that management determine the availability of supplier information critical to business operations prior to any reshoring decisions; without critical information, management may not be successful in relocating their operations. Reshoring strategies are equally important as the outsourcing strategies because the goal of reshoring is to correct the current issues with the original outsourcing decision.

According to Hartman et al. (2017), management should continuously revisit their outsourcing and reshoring decisions to ensure competitiveness and alignment to their strategic goals. Reshoring has varying degrees of difficulty. Albertoni et al. (2017) reported that firms reshored their IT services more cost effectively and expeditiously because of the intangible nature of services. Conversely, reshoring of manufacturing and engineering was more difficult because this industry is capital intensive and the products are tangible (Albertoni et al., 2017). Hartman et al. stressed the need for the outsourcer to supply and transfer all design artifacts and data necessary for the client to successfully reshore the outsourced activities.

Hartman et al. (2017) encouraged a structured approach to reshoring of activities and to weigh the benefits of having accurate and complete information available to the client organization as part of the reshoring decision. According to arguments by Albertoni et al. (2017), ITO and the services industry are more talent and capabilities oriented and not as capital intensive, making ITO more conducive to outsourcing and therefore, reshoring. In addition to understand reshoring strategies, one of the key success factors of ITO offshoring and reshoring is understanding the structure and

dynamics of the client-supplier relationship, and that business-to-business contracts that help govern the interests of both the client and supplier.

Client-Supplier Relationships

Outsourcing may be a risky strategy where unacceptable supplier performance may cause harm to the client's operations, reputation, and the reputation of the client's customers (Gunasekaran, Irani, Choy, Filippi, & Papadopoulos, 2015). Operational risks may occur when a client depends solely on the terms and conditions of the outsourcing contract to enforce the suppliers' behavior and delivery obligations (Rhodes et al., 2016). Rhodes et al. (2016) postulated that an outsourcing contract may not be enforceable in the country of the supplier, and although a lawsuit may be successful, the client may be unable to receive adequate compensation for non-performance or breach of contract.

An outsourcing contract by itself may be insufficient to safeguard a company's clients against dissatisfaction of their customers. Apart from an enforceable contract, clients should investigate and incorporate other levers to help build and secure a successful relationship with their suppliers to ensure quality performance and delivery to the satisfaction of the client and their customers. As part of a successful ITO strategy, and if applicable, management's consideration of the legal reach to foreign country to which they intend to offshore their services may be a discussion point in the interview process of this study, to probe the depth of the decision-making process to ensure customer satisfaction.

Xu, Cenfetelli, and Aquino (2016) found that one of the levers that is essential for a successful client-supplier relationship is trust. According to Xu et al. trust consist of

the ingredients of integrity, benevolence, and competence, and claimed that clients with trusted suppliers helped reduce their delivery and performance concerns. Xu et al. described the term *integrity* as a supplier's ability to prove honesty and adherence to high ethical standards, *benevolence* as acting in the best interest of the client, and *competence* as possessing the appropriate expertise to successfully execute the buyer-supplier agreement.

Rhodes et al. (2016) study of customer-supplier outsourcing relationships of 1,757 leading cross-industry companies concurred with Xu et al. (2016) that trust is essential to an effective partnership but only in manufacturing outsourcing and is inapplicable to outsourcing of services. Rhodes et al. concluded that effective services outsourcing resulted from the client`s ability to frequently manage their interaction with their suppliers. The interaction factors included frequent attention to issue resolution, stronger commitment, better communication, and relationship building. Clients who work effectively with their suppliers and monitor their performance, have more opportunities to timely resolve operational and customer satisfaction issues. Management's discussion of the vendor selection criteria was part of the interview process of this study to determine contributions to a successful ITO strategy.

Research into literature since 2015, on customer-supplier relationship and how to manage these relationships produced few results. Rhodes et al. (2016) confirmed the dearth of literature on this topic and concluded how to effectively manage such relationships is still uncertain; nevertheless, the findings of Rhodes et al. and Xu et al. (2016) were significant. While Xu et al. conducted their research in manufacturing

outsourcing and found that trust was essential to a successful customer-supplier

relationship, Rhodes et al. found that trust did not apply to services outsourcing and

inferred that these differences may emanate from differences in industries' supply chain.

For example, a services supply chain may consist of the intangibles of software codes,

while manufacturing deals with tangible products. These differences may infer that the

key determinants for successful customer-supplier relationships may be industry specific.

An interview with participants of this study may confirm or deny the findings of Rhodes

et al. as to the impact of supplier trust on successful ITO strategies.

Cha and Kim (2018) focused their research on the IT outsourcing industry on

supplier relationship management (SRM) between an outsourcing company and supplier

organizations to advance the understanding of interorganizational relationships. Cha and

Kim's emphasis on ITO contrasted with other researchers (Gunasekaran et al., 2015;

Rhodes et al., 2016; Xu et al., 2016) who focused on relationships between client

organizations and immediate outsourcing suppliers. The goal of the an effective SRM

and collaboration strategy is to meet the needs of the client organization and to maximize

the company's profitability (Akhavan, Shahabipour, & Hosnavi, 2018).

Hannan, Suharjo, Kirbrandoko, and Nurmalina (2017) found that customer

satisfaction, trust, and effective communications enhanced customers' loyalty to the firm.

Loyal customers provide a firm with repeat business to create a competitive advantage

(Suvittawat, 2015). Figure 4 illustrates the collective principles of customer satisfaction,

services supply chain management, and service delivery.

Management of client organizations apply formal customer relationship

management strategies to understand customer requirements, then work with their

internal resources and suppliers to deliver quality services to the satisfaction of their

customers (Santouridis & Veraki, 2017). The outsourcing company or prime integrator

assumes the risks and responsibilities for delivering the outsourced services. The

integrator typically performs essential work and may contract non-essential work to

suppliers in a multisource arrangement who may then retain IT personnel from lower-cost

sub suppliers (Santouridis & Veraki, 2017). The use of suppliers and sub-suppliers is an

innovative way for the integrator to lower costs.
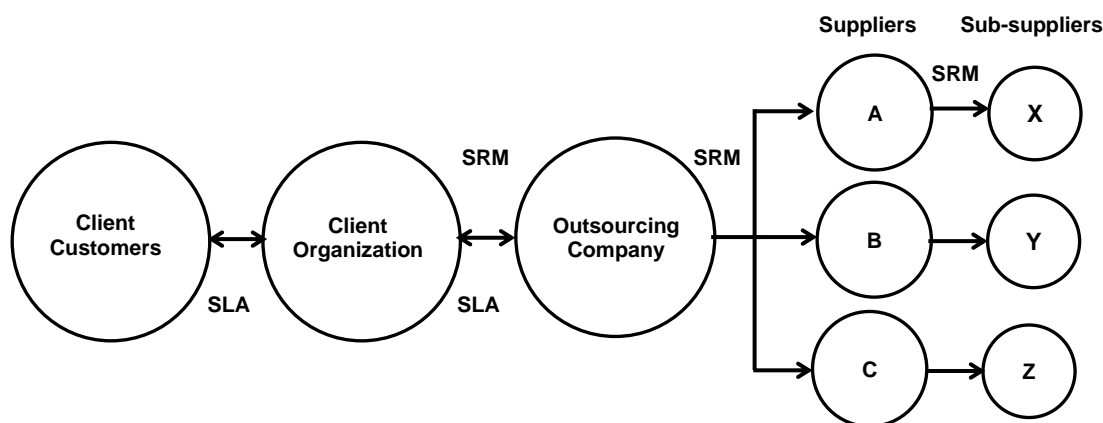
Figure 4. Supplier relationship management for customer delivery. SLA – service level agreement; SRM – supplier relationship management. Adapted from "Critical success factors for mutual collaboration with suppliers in IT outsourcing industry: a case study of a top IT outsourcing company in Korea," by K. Cha, and Y. S. Kim, 2018, *Enterprise Information System, 12*, p. 78. Copyright 2018 by Taylor & Francis.

The IT industry is extremely competitive, and cost management is an essential

component of the integrators business model as clients are demanding lower cost and

higher efficiency of service delivery (Cha & Kim, 2018). To achieve efficiency and cost

effectiveness, the client organization may employ collaborative techniques and service

level agreements (SLAs) to manage customer demands (Cha & Kim, 2018). Customers

use SLAs to assess, monitor and manage suppliers' performance (Alamri, Abbasi, Minas, & Zeephongsekul, 2018). While SRM is principally concerned with management and improvements of relationships between the outsourcing company and their suppliers, SRM applies to all parties along the supply chain (Cha & Kim, 2018). Figure 4 illustrates that management of the client organization synchronize SLAs between their customers, outsourcing company, suppliers, and the sub suppliers along the supply chain.

In this configuration, if the client organization cannot respond to their customers, all companies along the supply chain may lose their competitiveness (Cha & Kim, 2018). As with any complex construct, careful evaluation, selection of suppliers and building a trusting collaborative relationship are factors critical to successful delivery of services to the satisfaction of the end customer (Cha & Kim, 2018). However, Cha and Kim (2018) found no credible evaluation process for selecting and developing partner relationships and agreed with Rhodes et al.'s (2016) that there is a lack of research and clarity in managing customer-supplier relationships.

Although there is a gap in literature on how best to manage customer-supplier relationships, Johnsen and Lacoste (2016) discovered opposing customer-supplier relationships ranging from cordial to hostile because of power and dependence asymmetries. This discovery may contribute to further research on how best to develop customer-supplier relationships. Johnsen and Lacoste posited that relationships between suppliers and customers are seldom equally balanced, and imbalances give rise to conflict and inequalities of power, control, and dependence. Johnsen and Lacoste also discovered that neither trust nor respect were factors that attributed to the deterioration of business

relationships. The inference from this finding is that trust does not influence or correct power imbalances between business partners.

Lee and Ha (2018) supported Johnsen and Lacoste (2016) and added that one party's opportunistic behavior may also lead to deterioration in business relationships. Furthermore, a dysfunctional customer-supplier relationship emanating from power imbalances, conflicts, and opportunism may lead to customer dissatisfaction (Abosag, Yen, & Barnes, 2016). In conducting participants' interviews for this study, an exploration into the type of supplier relationship and the impact on customer satisfaction may provide insights into the success or failure of the participants' ITO strategies.

Johnsen and Lacoste's (2016) explored the dark side of business-relationships and found themes in three categories: conflict, power, and dependence. Johnsen and Lacoste found that the main causes for conflict between firms and suppliers emanated from hostility, forceful use of power, and opportunistic behavior, and stressed the difference between having power and using power. Johnsen and Lacoste found that the use of coercive power caused detrimental consequences to the less powerful party. These consequences included creating barriers to supplier innovation and contributing to uncooperative relationships.

Dependency may exist in an asymmetrical relationship between a firm and a powerful supplier, such as sole sourcing, where the customer is heavily dependent on a strategic supplier (Johnsen & Lacoste, 2016). The negativity of this dependent relationship may increase if the relationship deteriorates and the costs of switching to another supplier may significantly impact the company's profitability (Kim &

Henderson, 2015). Continued deterioration and uncertainty between the parties may lead to severe conflict which may propel the relationship to termination (Abosag et al., 2016).

Abosag et al. (2016) found varying degrees of conflict and opportunism with progressive negative consequences that are opposite to the increasing benefits of the bright side of a well-functioning customer-supplier relationship. The benefits of having a harmonious relationship is strategic and profitable to both the customer and supplier, while the consequence of the opposite is a dysfunctional, uncertain, and fragile relationship that eventually results in termination with financial consequences to both parties. An exploration into client-supplier dynamics with participants and the resulting effect on customer satisfaction provided insights into successful strategies in the findings of this study.

According to Munksgaard, Johnsen, and Patterson (2015), one party may purposely pursue a harmonious, asymmetrical relationship based on that party's self-interest; however, other researchers disagreed that such an unbalanced relationship can be harmonious (Abosag et al., 2016; Johnsen & Lacoste, 2016; Kim & Henderson, 2015). Munksgaard et al. found that a small supplier deliberately built a robust relationship with a powerful customer who used most of the supplier's production capacity. Munksgaard et al. observed this form of relationship aligned to product/technology development where the customer and supplier were in support of each other's interests, and the powerful customer determined the supplier's strategic goals.

In this scenario, Munksgaard et al. (2015) referred to the customer's influence over the supplier's actions as bargaining power as opposed to coercive power.

Munksgaard et al. also found that when small suppliers declared their self-interests to

their strong customers, they received more support from these customers. If the customer

did not support the supplier, the customer may risk full revenue potential or reputational

damage should the supplier not perform or fulfill their supply-chain responsibilities. To

increase value to the customer, Lacoste and Johnsen (2015) found that a supplier may rise

from a position of lower power by focusing more on customer support services to achieve

target performance levels instead of concentrating solely on being product centric.

Summary of Literature Review

This literature review is the result of an exhaustive examination of peer-reviewed

journals pertinent to major developments and contemporary research in ITO strategies.

The purpose of this research study was to explore what ITO strategies managers in

Sothern Ontario, Canada, applied to ensure customer satisfaction. Customer satisfaction

is the most critical factor for a company's success and enhances customer loyalty to the

firm (Hannan et al., 2017). This study has business and managerial relevance because

many advanced economies offshore technology services, supply chain, and value chain

activities to foreign offshore nations as a business practice.

America's imports of ICT services in 2014 was US$47.8B or 7.9% of total U.S.

services imports; researchers determined that approximately 40% of offshore

arrangements failed (Delen et al., 2016). An exploration into ITO strategies has real-time

applicability to help companies considering outsourcing be successful, promote

industrialization, and provide economic benefits to societies in domestic and foreign

countries. Figure 1 is a pictorial representation of the scope of the literature review and

encompasses ITO strategies, the theoretical bases, and client-supplier dynamics, culminating in customer satisfaction and ITO success.

The ITO strategy is a multifaceted topic with no single theory broad enough to fully cover the spectrum of ITO. The principal theoretical basis for this research was ST, with TCE as a supporting theory. These theories underpin the importance of stakeholders' involvement in making strategic-outsourcing decisions, negotiating market exchanges with foreign offshore companies for competitive advantage and lower operating costs. An examination of RBT and AT as alternative theories were inappropriate to this study because the theorists did not incorporate the key interests of customers and customer satisfaction in the ITO decision-making process.

The ITO is a strategic decision affecting a firm for the long term, thereby creating the imperative for management to perform diligent staff work in making ITO decisions. The scope of the literature review included research into ITO formal frameworks which management may use as tools to assist with more prudent decision-making approaches. Jia et al. (2017) admitted to the dearth of literature on ITO integrated frameworks and subscribed to the significant gap and opportunities for further research in this area. The literature review contained two formal outsourcing frameworks: (a) a strategy and structure model (Jia et al., 2017), and (b) a scoring model for outsourcing business objectives (Tjader et al., 2014). While Jia et al. based their framework on the manufacturing industry, managers considering services outsourcing may borrow, modify, or adopt concepts from this framework for appropriate application to their respective services industry.

Another aspect of ITO strategy in the literature review is the reshoring or insourcing of services as remedies for issues pertaining to suppliers' performance and delivery failures. Kinkel (2014) estimated that for every 4 to 6 outsourced activities, management re-shored one of these activities within 2 to 5 five years of offshoring them. The occurrence of reshoring is frequent enough for management to consider the impact of reshoring as part of their ITO decision framework.

Wiesmann et al. (2017) stressed that the best barrier to reshoring is to ensure managers take all precautions and actions to ensure they do not have to reverse their outsourcing decisions. A critical element of ITO success is understanding the intricacies of how vendors structure themselves using suppliers and sub-suppliers to meet their clients' needs (refer Figure 4). The strength of the suppliers' capabilities and the relationship dynamics between the client and supplier consistently determined customer satisfaction.

According to Rhodes et al. (2016), a contract may not be enforceable in a foreign country to the same extent as the client's home country, the client's best option is to build a trusting relationship with the supplier where the client may rely on the supplier's integrity and competence to meet the client's expectations. In the investigation of customer supplier relationship, I included the phenomenon of self-interest and hostility which Johnsen and Lacoste (2016) referred to as the dark side of a business-relationship. This negative aspect of a business-to-business relationship may lead to deterioration, failure, and eventual termination. Finally, the literature review included coverage of the spectrum of customer-supplier behavior ranging the successes of full cooperation to the

opposite end of hostility that led to customer dissatisfaction and ultimate outsourcing

failure.

Transition

Section 1 consisted of a structure containing the specific business problem that

some IT managers in Southern Ontario, Canada, lacked ITO strategies to ensure customer

satisfaction; this section also included several topical areas with an elaboration and

justification for the need to explore this business problem through a multiple case study.

The evidence by reliable government and research organizations showed that trillions of

dollars spent on ITO arrangements failed in the past and are expected to fail in the future.

A successful ITO arrangement may yield positive results in lowering costs, generating

higher profits, and improving customer satisfaction.

The literature review has persuasive evidence of a thorough investigation with

scholarly research into ITO strategies and the components of strategy frameworks,

strategy considerations, and recourse options to determine the key foundation of any

successful business i.e. customer satisfaction. The gap in literature corroborated the need

for further research into ITO strategies consistent with the purpose of this research study.

Section 2 contains details and discussions pertinent to defining and conducting a multiple

qualitative case study in Southern Ontario, Canada, with IT managers experienced in ITO

strategies. Coverage of this section include, but not limited to roles and responsibilities

of the participants, data acquisition and analytics, as well as reliability and validity of the

study. Section 3 primarily includes the results from Section 2, presentation of findings,

implication to business and society and recommendation for further research.

Section 2: The Project

The topics of Section 1 included the magnitude and frequency of failures in ITO and emphasized the importance of company executives who wish to outsource their IT services to exercise care and due diligence. To narrow the specific business problem to a region representative of a large North American metropolis, I stated that some IT managers in Southern Ontario, Canada, lacked ITO strategies to ensure customer satisfaction. The literature review included frameworks to help management decide on what services to outsource and whether they should consider captive or offshore outsourcing.

Section 1 also contained factors and considerations to help managers understand the structure and dynamics of a client-supplier outsourcing relationship. Section 2 covers details on several aspects of the research study with roles and responsibilities of the researcher and participants, research methods and design, aspects of data collection, organization and analyses, and the reliability and validity of the study. Section 3 primarily include the results from Section 2, presentation of findings, implication to business and society, and recommendation for further research.

Purpose Statement

The purpose of this qualitative multiple case study was to explore what ITO strategies managers in Southern Ontario, Canada, applied to ensure customer satisfaction. The target population for this study were IT managers or executives in Southern, Ontario, Canada, the sample of which were represented by nine IT executives with extensive experience in outsourced or offshored IT services. The implications for positive social

change may include acquisition of knowledge to help IT leaders achieve business success, boost local employment, and help marginalized communities in offshore ITO locations increase their living standards.

Role of the Researcher

The researcher's role consists of (a) planning and conducting qualitative in-depth interviews; (b) co-formulating meanings and interpretations with participants to ensure accuracy in the data collection process; (c) analyzing data, and; (d) performing line-by-line coding of themes, views, and perspectives (Wesely, 2018). These steps help to protect the integrity of the research. A researcher constructs a solid design platform and linkages between interview questions to accurately address the research questions (Yin, 2015). In constructing the study design, the researcher determines appropriate criteria to allow adequate collection of quality and quantity of data to attain data saturation (Ness & Fusch, 2015).

I have expertise and experience in ITO sufficient to construct narratives around the research questions to increase effectiveness of information gathering during the interview process. Wesely (2018) found that researchers who used narratives to frame interview questions produced informative interactions and quality outputs. Wesely also found that interacting with participants at the knowledge and experience levels neutralized negative dynamics and power differentials between the researcher and the participants. Interactions with participants were objective and ethical; to avoid or minimize any conflict of interest, I interviewed participants with whom I have a professional business relationship.

The researcher's role in the data collection process is to ensure ethical conduct and compliance to The Belmont Report. There are three ethical guidelines for conducting research with human participants (Williams & Anderson, 2018). The first principle concerns the respect for persons to ensure participation in the research program is completely voluntary. The second principle refers to fair treatment of research participants, making them aware of issues that may influence their decisions to participate in the research study, and provide opportunities to consult with experts to understand if their involvement is in their best interest. The third principle is protection of participants from harm while maximizing their benefits.

Kowalski, Hutchison, and Mrdjenovich (2017) argued that the ethics of the Belmont Report pertains to research involving vulnerable and marginalized individuals in clinical research and does not differentiate between types of research study. Williams and Anderson's (2018) view is consistent with Kowalski et al., that the Belmont Report applies to researchers and nurse scientists involved in bio-medical research. In conducting the interview for this study, I applied the tenets of the Belmont Report.

The qualitative researcher is the research instrument and may influence the outcome of the study through biases from the quality of data and reporting of results (Goodell, Stage, & Cooke, 2016). According to Goodell et al. (2016), personal biases may arise when a researcher influences the participant's response, to an extent they become mindful not to contradict the researcher's views. Consequently, member checking to confirm accuracy of data may not be adequate in correcting and improving the trustworthiness of the research study.

Opportunities for participants to correct the researcher and the period for doing so, remain within the control of the researcher, who decides what content reaches the final report (Ross, 2017). To mitigate biases, and improve trustworthiness, Goodell et al. (2016) recommended training in performing qualitative research, conducting interviews, and collecting unbiased data. Interview training, note taking, conducting mock interviews, bracketing, and complying to provisions of Walden University's IRB are steps to mitigate biases and avoid viewing data through a personal lens.

To aid in improving the quality of data from interviews in qualitative research, and to reinforce validity, Castillo-Montoya (2016) recommended a rigorous interview protocol for conducting structured and semistructured interviews. An interview protocol is necessary for researchers to obtain high-quality interview data in a methodical and consistent manner (Yeong, Ismail, & Hamzah, 2018). The protocol consists of four steps to ensure: (a) the interview questions support the research question, (b) the interview questions encourage a conversation of inquiry and generate more questions, (c) reviews and feedback of the interview protocol by an experienced researcher, and (d) a pilot to simulate real life condition in conducting the interview.

To enhance the quality of the interview interaction between the researcher and participants, Ross (2017) recommended that the researcher employ an empowerment strategy that allows the participants to have input on a structure and allow them to best express their views. This strategy may include a walking interview, choice of location, and adjustments to the interview protocol. For this study, I designed and used an interview protocol for consistency, professionalism, and thoroughness in conducting the

interview and data collection process.

Participants

The target population for this study were IT managers and executives in Southern Ontario, Canada, with ITO experiences with large multinational corporations. The representative sample consisted of nine IT managers and executives with over 7 years of experience with large ITO initiatives. The researcher's choice of the most qualified participants is essential to the quality of a research study (Streagle & Scott, 2015). Researchers create eligibility criteria to narrow interview candidates, determine the study population, and focus on the specific data for collection (Beaver, Gwynn, & Pazdur, 2017).

All participants in this study were (a) conversant on ITO strategies for outsourcing IT services; and (b) knowledgeable on ITO frameworks, partner relationships, and the resulting impacts to customer satisfaction. The researcher's positive relationship with participants enables a willful and comfortable sharing of information (Ross, 2017). To instill positivity and professionalism with the participants, I first contacted the qualified candidates to explain the purpose of the study and obtain an expression of interest to participate, prior to their signing the consent form.

Research Method and Design

Researchers and design specialists perform investigations to keep knowledge current (Shrivastava, Shah, & Navaid, 2018). In the field of IT, researchers aim to conduct investigations in a human context, considering the purpose, and the data the researcher needs to collect (Mandran & Dupuy-Chessa, 2018). According to Divan et al.

(2017), the research question should guide the research method most conducive to a user-centered investigation.

Alternatively, Green (2018) recommended that the choice of research method should depend on the researcher's knowledge, capabilities, and access to participants. Considering the positions of Divan et al. (2017) and Green, the choice of method should be one that combines both the best fit to the research question, as well as the researcher's ability to competently apply that method to the research investigation. The method and design must align to the research question and conceptual framework of the study (Santiago-Delefosse, Gavin, Bruchez, Roux, & Stephen, 2016).

Research Method

Researchers use one of three methods: qualitative, quantitative, and mixed methods (Bazeley, 2015). Researchers use a qualitative approach to explore, explain or describe a phenomenon through the lens of the participant's lived experiences, perspectives, and observations, while quantitative researchers examine the phenomenon in a measurable systematic way (Divan et al., 2017). Researchers express qualitative data in words and may quantify them for the purpose of performing analysis while in a quantitative approach, researchers collect data using numbers (Divan et al., 2017). Mixed-methods researchers combine quantitative and qualitative approaches in the same study for better substantiation (Divan et al., 2017; Murphy et al., 2017).

Quantitative researchers seek answers to questions of how much, and not information on the what, how, and why of a phenomenon (McCusker & Gunaydin, 2015). A quantitative researcher requires scientific training and expertise to be effective

(Shrivastava et al., 2018). Therefore, the quantitative approach is not appropriate to this study. The mixed methods research includes quantitative inquiry into the investigation of a phenomenon (Arris, Fitzsimmons, & Mawson, 2015). Furthermore, the mixed methods approach may be time consuming and expensive (McCusker & Gunaydin, 2015). Therefore, the mixed method approach was inappropriate to the study.

The field of information systems is complex, and the views of technology users are varied and contradictory (Mandran & Dupuy-Chessa, 2018). Mukhopadhyay and Gupta (2014) agreed with Mandran and Dupuy-Chessa (2018) on the complexity of IT, and found that for IT investigations, a qualitative method was preferable over other methods because a qualitative inquiry is structured, exploratory, and persuasive. For this study, a qualitative approach was the most appropriate to explore what ITO strategies IT managers applied to ensure customer satisfaction.

Research Design

Colorafi and Evans (2016) cited four design approaches to a qualitative research method: (a) narrative, (b) phenomenological, (c) ethnography, and (d) case study. A narrative researcher explores personal lives through self-report instruments (Adler et al., 2017). The participants' personal lives were not the focus of the study and therefore the narrative design was not appropriate to the study. A phenomenological researcher focuses on the lived experiences and circumstances of an individual (Alase, 2017).

Phenomenological design was not appropriate because the focus of this study was on companies' ITO strategic decision-making outcomes, and not limited to how humans experienced life from their circumstantial perspectives. Ethnographic researchers explore

cultures and intercultural behaviors (Mateos Cortés & Dietz, 2017), or the behavior patterns and perceptions of a particular group (Myers, 2018). The study of cultures or perceptions of a particular group was neither a fit with the research question, nor appropriate to this study.

The objective of a researcher is to collect participants data on the research subject and to make sense of the information under study (Dillman Taylor, Blount, & Bloom, 2017). A multiple case researcher seeks two or more specific cases for in-depth comparisons, observations of patterns and sequences pertaining to participants' experiences in a particular subject area (Argelagós & Pifarré, 2016). Accordingly, a qualitative multiple design was most appropriate to the purpose and research question for this study.

The multiple case design provided opportunities to collect valuable information, perform in-depth comparisons, and conduct continuous cycles of interviews to meet data saturation. According to Ness and Fusch (2015), data saturation occurs when no additional information or themes are available, and the researcher is satisfied with the quality and quantity of information from participants. Selecting an appropriate population for the research topic allows the researcher to collect valuable data from participants (Stivala, Koskinen, Rolls, Wang, & Robins, 2016); furthermore, researchers prefer a homogeneous sample of participants for data collection and analytics to facilitate data saturation (Rowlands, Waddell, & McKenna, 2015). To achieve data saturation, I continued to interview and collect information from participants until no new themes or incremental information of value were available.

Population and Sampling

Researchers select a population to collect valuable data for their research (Stivala et al., 2016). The target population for this qualitative multiple study was IT managers located in Southern Ontario, Canada, who outsourced their IT services and can attest to the successes or failures of their outsourcing strategies. The sample size for this study consisted of nine managers with over 7 years of ITO experience from which to gather rich information. Qualitative researchers select a practical sample for their study (Rosenthal, 2016), ensuring selection of the most qualified participants to enhance the quality of their study (Streagle & Scott, 2015).

The most common sampling strategies are: (a) purposive, (b) criterion, (c) theoretical, (d) convenience, and (e) snowball (Moser & Korstjens, 2018). Criterion sampling is the selection of participants who meet specific predetermined criteria (Moser & Korstjens, 2018). Other forms of sampling are *facility-based,* or *target* which involves only participants from a specific location (Gerassi, Edmond, & Nichols, 2017), and *purposeful* for recruiting those who meet specific inclusion criteria for rich information (Read, Toye, & Wynaden, 2017). Targeted participants, and purposeful sampling were the methods for this study because the target participants were located in Southern Ontario, Canada, and the participants satisfied specific ITO criteria to produce rich information and unique insights.

Data saturation is important to qualitative investigation and requires an adequate sample to attain redundancy in the data collection process (Sim, Saunders, Waterfield, & Kingstone, 2018). Malterud, Siersma, and Guassora (2016) recommended that any

estimate of sample size before the study, should change in steps during the study until data saturation. Furthermore, researchers prefer a small homogeneous sample of participants in qualitative research to aid in data saturation (Rowlands et al., 2015).

Jager, Putnick, and Bornstein (2017) argued that a small homogeneous sample that accurately reflects the population is generalizable. Streagle and Scott (2015) stated that qualified participants are essential to the quality and validity of a research study. To assist is reaching data saturation and validity, the criteria for this study included: (a) homogeneity of participants, (b) selection of qualified participants, (c) the use of multiple data collection methods, and (d) flexibility in scope in number of participants until new data added no new information.

The settings for the interviews were at the participants' location of choice where the environment is familiar, comfortable and where the participants feel empowered. Ross (2017) recommended an environment where the participant feels empowered to best express their views. The interviews in this setting were face-to-face, and on an individual basis for recording, focus, and information gathering with use of an interview protocol. Castillo-Montoya (2016) recommended a rigorous protocol for conducting structured and semistructured focused interviews. The interview process for study was subject to IRB approval, and the eligibility, willingness, and cooperation of each participant.

Ethical Research

The Department of Health, Education, and Welfare issued the Belmont Report outlining the tenets of ethical research (Bromley, Mikesell, Jones, & Khodyakov, 2015). The National Research Act, and the Belmont Report outline the principles, policies, and

processes for researchers to acquire the participants' voluntary consent, withdrawal, or termination of the research, if the participants are at risk of harm, or injury (Artal & Rubenfeld, 2017). Informed consent is a set of umbrella rules that establishes an obligation for researchers to protect the privacy of the participants, and to advise them of the purpose of the study prior to obtaining their consent (Tam et al., 2015). The consent form for this study included the purpose and nature of the study, procedures, risks, participants' rights, and contact information.

The consent form also contains provisions for voluntary participation, withdrawal, and discontinuation at any time without penalty, recourse or prejudicial treatment. Furthermore, the consent form provides for no compensation for participating but includes an incentive for each participant to receive a copy of the final study. The Walden University's Institutional Review Board (IRB) approves research involving human subjects and ensures compliance to university requirements and federal regulations; the IRB prohibits participant recruitment and data collection prior to IRB approval. The Walden University IRB approval number for this study is 04-23-19-0465007 and expires on April 22, 2020.

The researcher's responsibility for protecting the study participants' privacy is a critical element of ethical research (Wessels & Visagie, 2017). Protecting the integrity of the participants infers assurance for the privacy and confidentiality of the participants' information (Rashid, Caine, & Goez, 2015), including maintaining evidence and measures for protecting such information (Wessels & Visagie, 2017). Researchers use pseudonyms (P1, P2) to assure privacy, security, and confidentiality of participants

personal information (Canario Guzmán et al., 2017). In this study I assigned a

continuous alphanumeric code starting with P1 to represent Participant 1, P2 to represent

Participant 2, and so forth. Participants data are stored on a dedicated password-

protected flash memory chip, in a fire-proof safe along with other important proprietary

documents; after 5 years, I will shred and delete all electronic files and physical

documents.

Data Collection Instruments

Researchers are the primary collection instrument and must ensure rigorous

processes are in place to collect and analyze participants' information (Arriaza, Nedjat-

Haiem, Lee, & Martin, 2015); in this qualitative multiple study, I was the primary data

collection instrument. The data collection method for this study included in-person

semistructured in-depth interviews, and internal documents and artifacts the participants

supplied at part of the data collection process. Qualitative researchers Hoover, Strapp,

Ito, Foster, and Roth (2018), applied semistructured interviews as the primary method of

collecting information during in-person, telephone, and Skype interviews. In qualitative

case studies, researchers use different instruments to achieve triangulation (Goodell et al.,

2016).

Data triangulation refers to the process of collecting information about the same

phenomenon through different methods including interviews, documents, and materials

(Santiago-Delefosse et al., 2016). In conducting qualitative interviews for data

collection, Hoover et al. (2018), recommended that the researcher develop and use an

interview protocol. I used an interview protocol (Appendix A) containing the interview

questions, and discussion notes to ensure repetitiveness of the interview process. During

the interviews, I paraphrased to ensure accuracy of interpretation, and updated my field

notes as appropriate to for completeness.

Cypress (2017) recommended that researchers ensure rigor in the research and

data collection processes to enhance reliability and validity. To avoid risks to reliability

and validity, qualitative researchers use member checking or participants' validations

(Smith & McGannon, 2018), to improve the credibility of their research (Thomas, 2017).

I used member checking by validating my findings with the participants and followed up

with email correspondence and brief meetings for clarification and additional

information.

Performing member checks confirms that the interview transcripts, data

interpretations, and research findings are accurate (Birt, Scott, Cavers, Campbell, &

Walter, 2016). Another strategy to reduce biases and strengthen the trustworthiness of

the research study is data triangulation (Renz, Carrington, & Badger, 2018). By applying

a rigorous research process, member checking, data saturation, and triangulation I

enhanced the reliability, validity, and trustworthiness of the research process.

Data Collection Technique

Qualitative researchers use one of four basic methods for collecting data: (a)

observing from within the participants' setting, (b) observing participants where the

researcher may witness the same experiences as the participants, (c) performing in-depth

interviews, and (d) analyzing documents (Marshall & Rossman, 2016). Researchers

supplement these basic methods with secondary methods, including: (a) the internet and

digital applications, (b) multimodal inquiry, and (c) historical documents, videos, and drawings (Marshall & Rossman, 2016). The data collection methods in qualitative research are: (a) interviews, (b) documents and, (c) participant observations (Percy, Kostere, & Kostere, 2015). In this study, I used face-to-face semistructured interviews with individual participants and collected participants' documents.

Face-to-face interviews are efficient, timely and viable for most researchers to ask probing questions (Giovanis & Tsoukatos, 2017). Another advantage of face-to-face in-depth interviews is that the researcher may gain valuable insights into the participant's clandestine or internal experiences that may be difficult or impossible to achieve through observations (Levitt, Motulsky, Wertz, Morrow, & Ponterotto, 2017). The researcher's positional advantage in the participants' environment when performing observations may lead to unity between the researcher and the participants (Antonellis & Berry, 2017); however, the researcher may encounter continuous requests for consent as participants may wish to exclude the researcher's involvement on sensitive matters (Levitt et al., 2017). Data collection through observation may be more time consuming and costly because ITO strategy-formulation and impacts to customer satisfaction are protracted processes, and therefore not suitable for this study.

Researchers may undertake a pilot study to gather knowledge on how to conduct a specific type of qualitative research (Kaae et al., 2016). Some researchers conduct a pilot phase to ascertain findings and insights to determine if there is a basis to undertake a trial as the next step in the research study (Teychenne, van der Pligt, Abbott, Brennan, & Olander, 2018). A pilot was not appropriate to this study because researchers may use

semistructured interviews to clarify responses during the interview processes thereby rendering a pilot redundant.

A researcher's work in collecting information may lead to biases where the researcher's information is different from the participant's experience (Arriaza et al., 2015). To reduce biases, qualitative researchers use member checking during the data collection and data interpretation processes (Iivari, 2018). Member checking occurs when the researcher validates data and information with the participants for accuracy as a means of building the credibility of participants' data and research findings (Birt et al., 2016). To conduct member checking, the researcher provides the participants with their interview transcripts, themes, and interpretations for review, and makes corrections to improve the trustworthiness of the research data (Smith & McGannon, 2018). In this study I used face-to-face interviews as a productive and efficient way to collect valuable information and gain insights; I performed member checking with all participants to confirm the accuracy of interpretation, reduce biases, and improve the trustworthiness of the study.

Data Organization Technique

Researchers should organize the full collection of data, prior to initiating the data analysis phase of the study (Marshall & Rossman, 2016). Nili, Tate, and Johnstone (2017) suggested using a table structure to record and organize different data formats, annotations, and for coding of participant's identification for confidentiality. Researchers may also use computer-assisted software packages to organize and analyze diverse formats (Andrade, Costa, Linhares, de Almeida, & Reis, 2018). For conducting

interviews, I used a modern digital-speech recording device with native-transcription features for the timely and accurate reproduction and member checking of participants' transcripts.

I used NVivo 12 Plus (NVivo) to import and store the interview information and documents for data exploration, reporting, and analysis. Data storage devices for this study included a password-protected flash memory chip and Microsoft OneDrive cloud storage. Advancements in cloud computing and encryption services are secure and provide users with capabilities for privacy and confidentiality protection (Song et al., 2017). The data will reside securely on both cloud storage and the flash memory chip devices for 5 years. I will delete all electronic files and shred all documents and artefacts after 5 years in compliance with Walden University's retention policy.

Data Analysis

Methodological triangulation is the application of multiple methods of data collection to the phenomenon under study (Flick, 2017). Methodological triangulation is an interplay of different methods of data collection to enhance the validity of the research study and mitigate risks of researcher's bias. Fusch et al. (2018) emphasized that the typical type of methodological triangulation is the use of multiple data sources within one design. Fusch et al. also stressed the difference between methodological triangulation and data triangulation which refers to the collection of data across people, space, and time.

Kern (2018) suggested the use of methodical triangulation for qualitative case studies using in-depth interviews, observations, questionnaires, and document studies. I

used all data including participants information from semistructured interviews, company artifacts, and document studies to conduct methodical triangulation for this multiple study. Researchers use a multiple study to investigate instances of the same phenomenon using multiple methods of data collection (Percy et al., 2015).

The steps in qualitative data analysis involves collecting, organizing, reviewing, coding, interpreting, and making sense of the data (Srivastava & Hopwood, 2018). Watkins (2017) recommended the following processes for the analysis phase: (a) transcribe all audio, video, texts, and other qualitative data in a similar and consistent format; (b) populate all data in a table with multiple rows and columns of key data elements; (c) create a process of subsequent reduction by removing chunks of data using new news table versions to continuously narrow the data closer to the researcher's primary focus; and (d) interpret the data to determine findings, observations, insights, limitations, and deliverables of the research. To accelerate the analysis process, Marshall and Rossman (2016) suggested that researchers develop lineage and interpretation of the data by performing data collection and analysis as an iterative process. The advantage of this strategy is that researchers may observe emerging themes early in the process by scrutinizing and interrogating the data to discover supporting or conflicting evidence. Researchers may use software packages to help with the mechanical aspects of the data analysis process (Marshall & Rossman, 2016).

NVivo is computer-assisted qualitative data analysis software (CAQDAS) package for collecting, organizing, managing, coding, analyzing, and synthesizing data (Houghton et al., 2017). Robins and Eisen (2017) stated that developers continuously

improve NVivo by adding rich capabilities for screening, multidimensional queries, and speed of data analysis. The researcher, however, must develop the codes categories, code the data, and then use NVivo to perform data synthesis (Houghton et al., 2017). While NVivo is one of the popular software choices for qualitative researchers, Marshall and Rossman (2016) cautioned that the researcher still needs to perform the analytical work to identify themes, conduct thematic analysis, and make sense of the data.

Thematic analysis is a rigorous process of finding and analyzing recurring patterns (themes), concepts, and ideas within the data to formulate interpretations (Castleberry & Nolen, 2018). The researcher may develop codes, clusters, and themes starting with analyses of the literature review (Whitmore, Baxter, Kaasalainen, & Ploeg, 2018). Castleberry and Nolen (2018) developed the following processes for conducting thematic analysis: (a) compiling the data into a consistent and useable form which the researcher can import into a database, (b) disassembling the data and coding repeated terms and short phrases, (c) reassembling related codes to form clusters then applying analytical thinking to develop key themes, and (d) interpreting the data as the researcher iterates through the steps above. By using thematic analysis, the researcher has evidence of justifiable findings and conclusions (Stewart & Gapp, 2017).

For this study I used NVivo computer-assisted qualitative data analysis software (CAQDAS) package to upload all data, organize, interrogate, and perform thematic analysis to develop major themes. I aligned the themes to the literature review and conceptual framework. I revisited the latest publications and underpinning theories in the

conceptual framework and repeated the analysis to confirm the themes and incorporated the findings in this study.

Reliability and Validity

Reliability

Qualitative researchers should conduct their studies with extreme rigor to establish trustworthiness (Cypress, 2017). Alsaleh et al. (2017) used the words *reliability* and *dependability* interchangeably. In qualitative research, reliability refers to the ability of the researcher to replicate the results of an investigation if the parameters and conditions of the study remained constant (Walby & Luscombe, 2017).

Leung (2015) emphasized the importance of applying the same research processes to achieve replication, reliability, and dependability. Høyland, Hagen, and Engelbach (2017) found that researchers in a study did not apply the glossary consistently, and therefore deemed the study to lack trustworthiness. Reliability, therefore, infers rigor, dependability, accuracy, and trustworthiness in every aspect of the qualitative research process.

I ensured reliability of the study through the following: (a) expert validation of the review questions, (b) consistent use of an interview protocol, (c) member checking, (d) methodological triangulation, (e) data saturation, and (f) audit trail to ensure traceability and repeatability. Expert validation of the interview questions ensures the questions are comprehensive and appropriate to the research question, and the sample population (Culbertson, Weyhrauch, & Huffcutt, 2017). Use of a rigorous interview protocol

ensures a consistent and comprehensive guide for conducting the interviews (Castillo-

Montoya, 2016).

Performing member checks validates that the interview transcripts, data

interpretations, and research findings are accurate (Birt et al., 2016). Methodological

triangulation refers to different methods of data collection to enhance the validity of the

research study, and to mitigate any risk of researcher's bias (Flick, 2017). Data

saturation implies the collection of sufficient data to achieve data redundancy (Sim et al.,

2018). In addition to performing due diligence to ensure reliability, I fully documented

all aspects of the research process.

Validity

As cited in Forero et al. (2018), Lincoln and Guba developed four stringent

dimensions to test validity in qualitative research viz, credibility, dependability,

confirmability, and transferability. According to FitzPatrick (2018), validity refers to the

methods researchers use to eliminate or reduce threats to beliefs about the truth. Threats

to validity include researcher's biases that may compromise the quality of the research

study (Lyons, Karkou, Roe, Meekums, & Richards, 2018). Actions to address validity

follow below.

Credibility. The researcher may establish credibility through an extended

process of exploration to ensure truthfulness in the research results (Forero et al., 2018).

Strategies to enhance credibility include diligent observation to obtain rich data, member

checking, and triangulation (data, investigator, and method) (Korstjens & Moser, 2018).

Additional techniques include negative case analysis, involving a search for refuting

evidence, and peer debriefing by engaging experts for review and evaluation (Liao &

Hitchcock, 2018). I used the functionalities of NVivo for extensive exploration,

interrogation, and analytics to ensure truthfulness in the research results. Additionally, I

applied triangulation and member checking of information to enhance credibility of the

research findings.

Confirmability. Confirmability is the extent to which other researchers can

check and verify that the findings of the research are grounded in the data, and free from

researchers' biases (Korstjens & Moser, 2018). LeBlanc, Bourbonnais, Harrison, and

Tousignant (2018) suggested that the researcher should record quotes from the

participants to support confirmability and engage other researchers to create and verify

the themes. The researcher may also achieve confirmability by engaging experts to

analyze and review interviews, codes, and categories (Nemat-Shahrbabaki, Fallahi,

Valiee, Zarei, & Fallahi, 2018). To enhance confirmability, I used an interview protocol

during the interview process and asked probing question, triangulated data from various

sources, and conducted member checking to validate the accuracy of data interpretations.

Additionally, I consulted with an expert as appropriate to confirm the results of themes

resulting from data exploration and analyses.

Transferability. Researchers must ensure full documentation of the research

process along rich collections and descriptions of the participants' information; these

steps allow other researchers to independently assess whether the research results are

applicable to their set of circumstances (Korstjens & Moser, 2018). Researchers should

approach the study by applying methods and processes for generalization beyond the

specific study (Weis & Willems, 2017). Transferability, therefore, infers a degree of generalizability. When a reader can relate to a research study and apply that study to the reader's situation, the study has inferential generalization (Smith, 2018).

To address transferability and generalizability, I used an interview protocol, applied methodological triangulation, and collected data to saturation. The geographical restriction of this study to executives in Southern Ontario, Canada, may affect transferability to other executives and geographies. I documented the entire research process for researchers to assess and decide on the degree transferability to their set of circumstances.

Transition and Summary

Section 2 covered details supporting the purpose of this qualitative multiple case study, which was to explore what ITO strategies managers in Southern Ontario, Canada, applied to ensure customer satisfaction. The section specified the multiple roles and responsibilities of the researcher and participants, the importance of the using the research question in selecting the proper research method and design, the criteria for sample selection, and compliance to ethical research requirements. The section emphasized the researcher as the prime collection instrument and elaborated on the data aspects of collection, organization and analysis. Finally, the section elaborated on strategies to ensure reliability, and validity to the research findings, including the use of an interview protocol, data saturation, triangulation, and exercising well-documented rigor throughout the research process.

Section 3 primarily includes the results from Section 2, discussion on the findings

of the study, and practical implications to business and society. Section 3 also details any

recommendations for further research, disclosure of insights from undertaking the

research process, and concluding statements.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative multiple case study was to explore what ITO strategies some IT managers in Southern Ontario, Canada, used to ensure success and customer satisfaction. The sample consisted of nine IT executives in Southern Ontario, Canada, with extensive experience in ITO strategies, and involved in ITO decision making, planning and execution, particularly with large multinational corporations. In this study I referred to the participants as P1, P2, P3, and so forth. I used an interview protocol of semistructured, open-ended questions to conduct the interviews, collected artifacts from participants authorized to produce those artifacts, and included new studies to achieve data saturation and methodological triangulation.

Four themes emanated from my investigation: (a) strategic intent for outsourcing, (b) applicable frameworks, (c) risk awareness, and (d) partnership strategies. Participants outsourced their IT services to benefit from: (a) cost advantages; (b) core competencies; (c) skills specialization to achieve innovation, technical development, and project management; and (d) global coverage and resource flexibility. Participants deployed two major types of frameworks: (a) sourcing frameworks to ascertain what IT functions to outsource, and (b) vendor-decision models to select a suitable supplier. To help ensure success participants recommended four critical areas of focus: (a) positive client-supplier dynamics, (b) effective governance, (c) client-supplier trust, and (d) active employee engagement.

Presentation of the Findings

The central research question for this study was: What ITO strategies do some IT managers in Southern Ontario, Canada, apply to ensure success and customer satisfaction? I performed thematic analyses of the literature review, participants' interviews, and artifacts. Four themes from the analyses aligned to the central research question: (a) strategic intent for outsourcing, (b) applicable frameworks, (c) risk awareness, and (d) partnership strategies to ensure customer satisfaction. The structure of the findings consists of a summary of each theme followed by the details of data collected from participants' interviews and artifacts.

Theme 1: Strategic Intent for Outsourcing

In response to investigations into the participants' rationale for ITO, all nine participants (P1 to P9 inclusive) provided a combination of strategic and competitive reasons for outsourcing their IT services; no participant provided a single reason to outsource their IT services. The combinations of reasons were (a) achieve a cost advantage; (b) focus on core competencies; (c) promote innovation, technical development, and project management through skills specialization; and (d) obtain global coverage with resource flexibility. These reasons were consistent with Lacity et al. (2017), and Joshi and Lee (2019), who added 24-hour support for applications development and maintenance to their findings.

An outlier finding from two participants (P2 and P9) was that ITO positioned their respective companies for faster transition to cloud computing. Cloud computing is the most recent transformation in IT, and an effective mechanism for flexibility in

creating a competitive business environment by paying for IT usage on demand (Zhang

& Ravishankar, 2019). All participants viewed ITO as strategically important to achieve

a higher degree of competition by enhancing their companies' long-term value creation

process.

Value creation refers to the customers' expectations of benefits (Priem, Wenzel,

& Koch, 2018); long-term value creation should be a company's main objective

(Schoenmaker & Schramade, 2019). The conceptual framework of stakeholder theory

and transaction cost economic theory directly ties to the strategic intent for companies to

achieve a competitive advantage by enhancing long term value creation through

collaboration and decision making with relevant stakeholders. The details of the findings

for strategic intent follows.

While four participants mentioned cost as a consideration for ITO; none of the

reasons were solely for the benefit of achieving a cost advantage. For example, P6

specified that while cost was important to their stakeholders, "It was not the overriding or

determining factor." P6 mentioned that the stakeholders' ITO decision was not a cost

play but the result of strategic thinking to sought after world-class technology capability

to help "achieve service quality and scale, consistent with the law of numbers." P6

contended that the company's return on assets under management (RAO) and return on

investments (ROIs) were significantly greater than any gain from cost reductions.

Additionally, P1 company's stakeholders outsourced all IT services to achieve scale

economies, reduced costs through consolidations, and improve the quality of IT services.

Another reason for ITO was to allow the management team to focus on core

business by outsourcing IT services not essential to business operations; three of the participants outsourced IT services for this reason. P3 explained that the company's board of directors did not want to invest in IT assets, capital associated with data centers, and the refreshing of desktops and infrastructure servers. P3's focus was on strategic growth through mergers and acquisitions and needed a supplier with a global presence who can supply IT services more competently than the company's internal IT team.

Similarly, P7 recognized that IT Infrastructure was not part of the company's core business; the company required access to IT skills and efficiencies and decided that buying was more efficient that building an IT team internally. This decision remained consistent with transaction cost economic theory in the conceptual framework. P6 mentioned that they did not want to spend the effort and bandwidth to build an internal organization to perform work that would not meaningfully differentiate their business; P6's view was they can outsource that problem to a supplier and spend less time managing the outsourcer instead of building and managing an internal team.

Four participants said that specialization of skills was the major reason for outsourcing their IT services. P1's team outsourced to achieve technical co-innovation to help improve their delivery capability. Similarly, P2 outsourced their IT services to acquire deep technical skills by leveraging the outsourcer's cross industry experience and best practices not available internally. P4 required development and project management (PM) expertise for a portfolio of highly specialized applications, critical to business operations. P6 emphasized their need to outsource to a prominent world-class technical partner to improve IT service quality and speed of delivery complementary to their first-

class, industry-leading business reputation.

Other reasons for outsourcing were to achieve global coverage and resource flexibility. Two of the nine participants outsourced to a large global supplier of IT for strategic reasons. P3 required a strong technical partner with a global present to connect all their worldwide locations critical to the logistics of moving products from one location to another as part of the supply chain process.

P8 mentioned that their company's strategic direction was to grow rapidly by acquiring companies to achieve a global presence and required a global IT supplier to enable systems consolidation between the parent and subsidiary companies. The pace of growth through acquisitions also required an outsourcer with a scalable resource bench to meet the company's IT needs. Similarly, P7's organization had global operations and required a pool of technical resources to provide the flexibility and scale economies not possible with internal IT resources.

Theme 2: Applicable Frameworks

I investigated the participants' application of two types of ITO frameworks that may aid in ensuring success and customer satisfaction: (a) sourcing frameworks to determine what IT functions to outsource, and (b) vendor decision models to determine how participants qualified the winning supplier to execute the outsourced IT services. One of the major limitations of ITO is the lack of research into integrated frameworks to help managers decide what IT functions to outsource (Jia et al., 2017). The intent of this investigation was to uncover any insights participants may offer to advance this area of study; elaboration on these frameworks follow.

Sourcing frameworks. In the literature review three sourcing frameworks exist, ranging from simplicity in approach to a very complex multidimensional structure; Espino-Rodríguez and Ramírez-Fierro (2017) proposed a simple model in which mangers identify and outsource IT functions with low competitive impact, while Jia et al. (2017) proposed a sophisticated strategy and structure framework suitable to large manufacturing companies. Participants (P1 to P9 inclusive) used either: (a) cost-benefit models, (b) internal discussions and experiences with known suppliers, or (c) a combination of both. The participants used these frameworks to outsource a full spectrum of IT services including web applications, infrastructure, hosting, service desk, and applications development and support.

An outlier finding was a participant's use of a well-structured integrated, software-development framework to identify IT skills deficiencies, then outsourced all technical development activities to a specialized supplier. Pankowska (2019) stated that integrated frameworks require a collaboration process that emphasizes activities important to the sourcing process. Stakeholder theory directly applies because integrated frameworks require high collaboration with all relevant parties to maximize benefits to the company's stakeholders. The details of the findings of participants sourcing frameworks follow.

Five participants (P2, P6, P7, P8, and P9) used industry standard business cases and cost-benefit models; P6 and P7 outsourced their infrastructure, and application software services, P9 outsourced these same services and the service desk, and P8 outsourced their applications and data base support services. P8 and P9 reported that

while their cost-benefit pro-forma models showed positive results, the actual results were negative. These outcomes remained consistent with Foerstl et al. (2016) who cautioned against the use of cost assessment models to make ITO decisions, because of the many flaws with applying cost-analysis models.

Pankowska (2019) found that the many risks in an outsourcing chain may lead to uncertainty of cost reductions. P2 used a well-structured software development life cycle as a value-assessment framework with the aim of acquiring the best industry knowledge and faster time to market with lower cost and risk. P2 outsourced their applications' code development function and ongoing support, then transitioned their efforts from managing internal resources to managing the vendor.

Four participants (P1, P3, P4, and P5) did not use any ITO frameworks in their decision-making processes. P5 explained that their company's executives decided to outsource their infrastructure services because of prior involvement in a joint venture with a major outsourcing supplier. P5's company later sold 100% of their shares in the joint venture to the outsourcing supplier, including IT assets, mainframes, and high-availability servers. P1 reported that executive involvement with a client's parent company influenced full outsourcing of the client company's IT services to a major supplier.

P3 and P4 followed the direction of their respective company's Chief Information Officer (CIO) who had positive experiences with large ITO vendors. These companies did not want to incur the administrative overhead of multi-sourcing and preferred a single vendor who had capacity, technical competence, and a global presence. P3 commented

that while this strategy may be advantageous, there were huge risks to the company's

business, if unsuccessful. P3 fully outsourced asset management, management of the

performance-based processes, including: (a) incident management, (b) problem

management, (c) capacity planning, (d) the service desk, (e) high impact business

applications, (f) network services, (g) infrastructure hosting, (h) end-user services, (i)

monitoring, and (j) crisis management.

Vendor decision models. Questions in this study included asking the participants

to comment on any frameworks, processes, or methods they used to select the vendors

pursuant to identifying what IT functions to outsource. Participants either (a) used a

formal request for information (RFI) and/or a request for proposal (RFP), or (b) sole

sourced to a familiar supplier with whom the participant has a current or preexisting

relationship. The RFIs and RFPs are documents that managers use to describe the future

state of their organizations then solicit competitive bids from vendors, collaborate,

evaluate, and select the winning candidate (Linden & Rosenkranz, 2019). An example of

the table of contents of an RFP is in Appendix B. P6 and P8 hired an outsourcing

advisory firm to guide them through the RFP and vendor-selection process. Researchers

identified a recent trend for executives to hire advisors to guide them through the ITO

processes (Linden & Rosenkranz, 2019).

An outlier finding was one of the participants worked jointly with an executive-

appointed supplier, created the ITO requirements, and co-authored the ITO contract.

Amoako-Gyampah, Boakye, Adaku, and Famiyeh (2019) stressed the importance of

frequent collaboration between companies' stakeholders and their suppliers to meet

global competition, sustainability, and customer demands. Participants' application of vendor decision models, and collaboration with their suppliers align to stakeholder theory in the conceptual framework; ST advocates high collaboration with relevant stakeholders who can affect executive's decisions on competition, sustainability, and customer demands. The details of findings from participants follow.

P1 selected the outsourcer based on a prior positive relationship between the client's parent company and the outsourcing firm. According to P1, the outsourcer was proactive in developing a relationship with the client-company's executives and educated them about the supplier capabilities in a manner similar to the response to an RFP. This process allowed the outsourcer to get closer to understanding the client's business operations (P1). Similarly, P3 complied with the direction of upper management and in particular the CIO, skilled in ITO, and who had a positive experience with a particular vendor. P3 emphasized a positive experience in the past with a supplier does not mean that the same will occur in the future because of the uniqueness of every ITO situation.

P2 stated that they had mature procurement organization and went through a formal request for information (RFI) process with several major vendors from the company's preferred vendor list. The company used a scoring process to select a short list of suppliers after which they conducted a rigorous due-diligence process including "anti-money laundering and other investigations to arrive at the winning candidate with the highest standards of security, integrity, and capability" (P2). The winner was a large consulting vendor with locations onshore and offshore (P2).

P4 involved their Procurement Department to lead an RFP process with several

ITO suppliers. P4 explained that the company separated the suppliers' responses to the

RFP into technical and business segments; the technical staff evaluated responses to

technical questions, and the procurement staff with other company stakeholders evaluated

the commercial aspects of the response. Procurement with other stakeholders selected

the winning supplier through an interview and negotiations process (P4). P7, P8, and P9

used a similar process where companies' managers solicited RFIs, then quickly moved to

the RFP process to select the winning candidate.

In contrast, P5's company sole sourced to a large known vendor with whom they

had a preexisting relationship, but also received several unsolicited proposals from other

large suppliers. At a later date, prior to contract renewal with the supplier, P5 solicited

RFPs from competitive suppliers for price validations but remained with the incumbent

because of the risk of incurring significant switching costs. P6 partnered with an

outsourcing advisory firm to help structure a scoring process because the company did

not have a Procurement Department, or internal sourcing skills. The advisory firm

further assisted in the recommendation of two credible vendors; P6's company chose the

winning supplier mainly on their instincts of what they felt was the best fit for their

company.

Theme 3: Risk Awareness

All participants experienced significant risks and challenges, including supplier

disputes, contract renegotiations, and failures. Risks arise from negative outcomes

(Willcocks et al., 2017). All participants faced several challenges including: (a) contract

misinterpretations, (b) stakeholder's misalignment on ITO requirements, (c) client

outsourcing inexperience, (d) organizational misalignment on the ITO strategic benefits, and (e) lack of supplier competence. These findings reinforced Mandran and Dupuy-Chessa's (2018) statement that the field of ITO is complex and involves risks and uncertainties. Schmidt, Zöller, and Rosenkranz (2016) found that ITO projects remain very challenging, and many fail despite vendors' promises of higher delivery quality and lower costs.

The conceptual framework of stakeholder theory of high collaboration, and the supporting theory of transaction cost economics for acquisition of services at lower cost are applicable; however, there is no guarantee of success. Stakeholder theory advocates collaboration between all parties to minimize challenges and to increase the chances of success for the benefit of the parties (Strand & Freeman, 2015). The stakeholders involved in the ITO process included the client company's leadership team, customer relationship managers, developers, the solutions engineering team, the infrastructure team, delivery staff and their counterparts from the vendor's organization. Elaboration on the findings follow below.

P1 recalled many issues and daily discussions with client and vendor stakeholders on the interpretation of the outsourcing contract. The supplier produced performance reports which the client viewed through the lens of an auditor, causing a confrontational discussion on why the supplier was not meeting contractual performance metrics. The client focused heavily on performance reports and means of managing the supplier's deliverables (P1). Eventually, the client and the outsourcer held regular meetings to discuss solutions to improve and resolve their hostile relationship (P1).

P2 actively participated in a dispute resolution process with the supplier through arbitration which is one step removed from litigation, and which resulted in the supplier returning payments to the client for sustained unsatisfactory performance. P2 explained that neither the client nor the supplier could interpret the contract at the working level and therefore could not apply the contract operationally, because the client's and the supplier's executives constructed the contract at a high level. Furthermore, the supplier focused on cost containment which conflicted with client's focus on quality and service delivery (P2).

P2 stated that another issue they faced was the supplier used a model that allowed them to source skills to specific roles; this model conflicted with the client's internal resourcing practices that allowed the deployment of resources where necessary to optimize utilization and productivity. During the first 12 months of the contract, the client and supplier did not trust each other until the client and supplier began to work cooperatively on resolving their relationship issues (P2). On a positive dimension, P2 reported that their scope of work was very large, and the supplier had a bench of qualified developers who helped the client remediate technical development issues and innovation challenges; the supplier also assisted in resolving stability and complex integration issues.

P3 reported that after 2 years into their ITO contract they "disrupted the contract" and repatriated their IT networking services because the supplier did not deliver to critical network-availability service levels. P3 realized that the supplier did not have the capability to deliver the IT services, and "for every 30 minutes of transportation delay, the company lost over a million dollars." Subsequently, P3 backsourced the networking

services, then re-sourced the services to another IT supplier. All other IT services remained with the original supplier.

On other deliverables, P3 discovered that the supplier satisfied only 25% of the contract scope. P3 also discovered that the IT service management segment of the outsourcing contract included a substantial amount of the outsourcer's management fees, and overhead costs. P3 concluded that the contract could not be sustained and forced a renegotiated contract with the supplier. Following the renegotiations, and to ensure delivery to the new contract, P3 created an internal quality assurance team with a mandate to establish operational governance over the services the outsourcer provided.

P4 mentioned several serious challenges with the outsourcer. The outsourcer's management team included an offshore location, and the supplier appointed a single point of contact (SPOC) on site for resolution of all client issues. There was high rotation with the supplier's SPOC and consequently the supplier failed to resolve many outstanding issues and did not communicate many of the client's concerns to the supplier's offshore leadership team (P4). P4 observed basic technical flaws with the supplier's work which affected the remediation of critical applications under emergency conditions.

Although the outsourcer reported a green status on key performance indicators (KPIs), customer dissatisfaction was remarkably high (P4). P4 observed that the number of incidents continued to increase because the outsourcer did not resolve incident tickets on time, and reopened the same incident under a new ticket number to circumvent time-to-resolve infractions. On the P4's insistence, the outsourcer relocated a very senior member of their management team from offshore to onsite and began the work of solving

many of the issues and challenges.

P5 stated that with any outsourcing arrangement, there is always a level of discord. P5 recalled that many of the employees they rebadged to the supplier, left the supplier's organization either voluntarily or through termination. Consequently, the client suffered significant issues with the supplier's quality of service delivery (P5). Other related issues that compounded the problem was a lack of systems documentation and with the departure of key personnel, the client organization suffered from a loss of "tribal knowledge" critical to operations (P5).

P5 commented that upon reflection, the terms of employment for client personnel who transitioned to the supplier should be much longer to minimize the substantial negative impact to the client's business. Another challenge P5 faced was the supplier lacked minimum infrastructure standards, and did not implement any leading practices, perform yearly server reboots and update server patches. As a result, P5 is in discussions with the supplier on currency upgrades and a comprehensive modernization program.

P6 encountered several challenges with their outsourcing arrangement. P6 explained that the consulting firm they hired to assist with their outsourcing strategies created a complex voluminous document that did not address the nuances of their business and technology requirements. P6 indicated that the outsourcer completely misunderstood their core business and the specialized technologies necessary to service the company's complex transactions and processes.

P6 had explained to the outsourcer that they expected automation, speed of execution, and a higher quality of service delivery, and not necessarily cost savings.

However, the outsourcer continued to experience application support challenges, quality and throughput issues, and lacked the ability to deliver IT services to client expectations. Furthermore, the outsourcer conceded they had no capability to meet an engineering segment of the scope of IT services (P6). In response, P6 stated that the client rewrote the outsourcing contract, hired new roles, backsourced the engineering component, and provided the supplier with a final opportunity to deliver quality services.

P6 recalled during the outsourcing transition phase, there were numerous regulatory bodies, government agencies, as well as internal and external stakeholders, who raised concerns that affected management's approach to speed of transition, and timing of change-of-responsibility to the outsourcer. The company took a full-scale approach to employee attrition in which critical mass left the organization concurrently, exposing the company to substantial operational risk (P6). In retrospect P6 purported that a phased approach would have been more appropriate with less impact to the company's operations.

P7 explained that not all stakeholders aligned with the benefits of their ITO decision. P7 recalled the substantial management effort to obtain internal stakeholders' support, and the contention they experienced during the execution phase of the ITO contract. P7's view was that ITO extends beyond those accountable for the services but to the consumer of services. P7 commented that stakeholder management and stakeholder alignment need investment upfront and to have dialogue explaining why the decision to outsource. P8 participated in outsourcing one of the more complex areas of their IT services; despite multiple attempts to rectify delivery issues, the outsourcer did

not meet expectations, and P8 terminated the outsourcer's contract for cause.

P9 stated that ITO was a learning journey for their company, and instead of applying a model for sharing of benefits, they created a penalty-based contract which influenced the supplier's behavior to focus on penalty avoidance instead of innovating. The company's outsourcing strategy significantly increased the costs of smaller-office locations because the outsourcer upgraded their legacy technologies to North American standards (P9). The contractual SLAs hindered the supplier from taking risks to innovate because the supplier felt that the client would penalize them if they negatively affected the stability and quality of service. P9 stated they could not be responsive to high levels of customer dissatisfaction because the process to change the terms and conditions of the contract was slow and tedious, and management could not make the changes quickly enough to remediate persistent quality issues.

P9 remarked that the outsourcer did not have the experience with the particular work in the company's geographical region, and admitted their executives embarked on an ITO arrangement naively, thinking they would literally transfer the services over to the outsourcer without understanding the interface points and execution of services. P9 stated that they did not delve into the granular levels of process design to help determine what specific IT components to outsource, or define an engagement model of how the outsourcer would act as an extension of the client company; they simply "threw the IT services over the fence" to the supplier. As they began to suffer from poor customer perceptions and unacceptable service quality, they realized that they lacked the understanding of how to work with a supplier to run the business (P9). On a positive

note, P9 commented that they learned much from the ITO experience, including the fragility of the company's processes.

Theme 4: Partnership Strategies

Given the many ITO challenges above, I asked participants to elaborate on their successes and offer recommendations to help ensure customer satisfaction. Their responses centered around four areas: (a) positive client-supplier dynamics, (b) governance, (c) trust, and (d) employee engagement. Highlighted are the key findings from each subtheme below, followed by the details of the findings by subthemes.

Participants described positive client-supplier dynamics as both parties working collaboratively for the collective good of the partnership by focusing on the choice of a suitable supplier, deal principles, and innovation. Pihlajamaa, Kaipia, Aminoff, and Tanskanen (2019) proposed that company managers ensure their suppliers have the ability to innovate and share their innovations with the client. From the supplier's perspective, a customer is perceived to be attractive if the supplier has a positive expectation of value from the relationship (Tanskanen & Aminoff, 2015). Supplier innovation and the perception of customer attractiveness contribute to a productive and mutually beneficial customer-supplier relationship. The successes from both parties working together for the collective good of the partnership supports the findings from researchers Freudenreich, Lüdeke-Freund, and Schaltegger (2019), who posited that stakeholders' relationships create multidirectional value flows that correlates with conceptual framework of Stakeholder Theory.

Most participants emphasized the need for governance and SLAs. An example of

an SLA is in Appendix C. Two of the participants (P5 and P9) recommended that clients place more emphasis on service level objectives (SLOs), with no financial penalties, as a mechanism to manage the contract, instead of focusing on SLAs which may give rise to a problematic relationship.

Fehrenbacher and Wiener (2019) found that while SLAs are essential to a contract, SLAs with penalties reduce employees' positive attitude towards the supplier and increase their focus on managing the SLAs. According to Amazonas, Akbari-Moghanjoughi, Santos-Boada, and Pareta (2019), SLOs are measurable characteristics of SLAs which the client and supplier outline in manner to avoid disputes from a misunderstanding. Fehrenbacher and Wiener recommended careful consideration of the specific outsourcing goals and the use of compensation-based SLAs which may affect the success of the ITO arrangement.

The SLAs with compensation correlates to the ST and TCE theories in the conceptual framework for this study. Transaction cost economic theory has an economic focus similar to SLAs. According to Williamson (1991), TCE causally relates to the focus on the economics of the client-supplier relationship with the aim to minimize cost by outsourcing the production of goods and services. Derakhshan, Turner, and Mancini (2019) recommended that governance researchers seek a broader view of compensation-based SLAs. P5 and P6 recommended SLOs which focus on collaboration and less on penalties, consistent with stakeholder theory.

All participants agreed that a trusting relationship between the client and supplier is essential especially in ITO where the contract term may range for several years. Most

of the participants experienced a period of tension and distrust because of delivery

challenges. Laurie and Mortimer (2019) found that tension and friction between

stakeholders across organizations may result in a lack of trust and transparency, however,

more collaboration can lead to a stronger shared understanding. The participants'

definitions of trust included the following: (a) credibility, (b) transparency, (c)

competence, (d) consistency of acceptable performance, (e) frequent collaboration, and

(f) action planning and execution to deliver on the outsourcer's promise to the client

company.

Most participants stressed the importance of including in the ITO contract, the

names of employees the outsourcer inherited, knowledgeable about the client's business.

P5 included the names of the supplier's employees with expert technical knowledge, in

the contract for a specified period of time, to help provide quality of service. All

participants stressed the importance of organizational alignment and engaging employees

to explain the value and strategy of ITO, and transparency about their future with the

company after the transfer of responsibility to the supplier. G. R. Lee, Lee, Malatesta,

and Fernandez (2019) found that implementing proper managerial practices to instill

positive attitudes helped to reduce the harm of employee dissatisfaction.

G. R. Lee et al. (2019) also found that providing the supplier's employees with

opportunities to interact with the client's employees helped to motivate the supplier's

employees. Stakeholder theory and organization alignment consider collaboration,

communication, and planning with employees and all affected parties (i.e. stakeholders),

essential for organizational success (Hickman & Akdere, 2019). Stakeholder theory in

the conceptual framework aligns to employee engagement an as essential element of ITO

success, because employees are key stakeholders to knowledge transfer and other ITO

processes. The details of each subtheme follow below.

Client-supplier dynamics. After experiencing several ITO challenges and the

repatriation of network services, P3 concluded that a client-supplier relationship is akin to

a marriage with some formalities; P3 stated "if one expects an unfaithful spouse to be

faithful by signing a contract, the relationship is already in jeopardy." Both parties share

the responsibilities for success or will separate; P5 and P9 echoed the same analogy

further stating that no contract or marriage certificate will hold a relationship together,

unless both parties work on the spirit of the relationship. In the second round of

outsourcing of their network services, P3's team gathered a much better understanding of

their requirements, and how to choose a suitable supplier to fulfill the company's

requirements. P3 stressed the importance of meeting with other customers of the supplier

to reference and ask key questions including relationship dynamics, prior to contracting

with the supplier.

At the time of renewal of the ITO contract with their supplier, P5 invested time to

renegotiate the contract to achieve predictable ITO expenditures; therefore, they gained

high confidence in authorizing the business case with anticipation of realizing the

expected savings from the ITO arrangement. P5 attributed their success in part to

creating deal principles with the supplier and to periodically assess their progress against

the achievement of these principles. One of the deal principles was to align on

automation on every aspect possible to further realize benefits, and for the parties to share

in the benefits. P5 also stressed the learnings from these challenges that while managers can outsource ITO responsibilities, they cannot outsource accountability; they are still accountable to company's stakeholders.

P7 recommended to spend less time on contractual details and more time on the commonality of the outcomes and incentive schemes to allow the partnership to succeed. P7 advocated to avoid impediments on contractual language, contractual-based measures, KPIs, and penalties. P7 stressed the importance of driving to a model of reciprocity to benefit the outsourcer and client company. P9 recommended that the client and supplier work as partners for the collective good and outcome for both parties. P9 suggested to start small and apportion a specific piece of service as an initial pilot to understand cultural implications.

To manage and mitigate the ITO fear factor, P9 stated that the pilot project should be well structured in terms of what ITO objectives the client tries to achieve, and to connect these objectives to their broader outsourcing drivers and aspirations. P9 advised that the client exercise patience in undertaking the ITO learning journey before deciding to leap ahead with a big-bang approach, recognizing there are significant change-management issues ahead. To minimize failure risks, P9 suggested that companies retain a consulting firm specialized in the clients' ITO areas of interest with the knowhow and insights to navigate a client-supplier relationship.

Governance. Despite a good client-supplier relationship, most participants expressed the need for governance in any ITO arrangement for performance measurement. Governance characteristics includes a communication plan, measurement

charter, conflict arbitration and enforcement plan (Fehrenbacher & Wiener, 2019). P1

stressed the importance of the client company to implements controls and service-

execution provisions to help manage the supplier's deliverables, and for the supplier to

manage their supply-chain activities at onshore and offshore locations. P2 reinforced the

need for clients to put in place effective governance processes and reporting to evaluate

the supplier's value proposition and to make the necessary contractual adjustments to

affect the supplier's obligations to the client. P2 reported that the costs of learning how

to put these processes in place were high and time consuming but provided a long-term

view of how to manage the contract.

As a control point, P3 changed the responsibility for incident closure from the

outsourcer's staff to the end-user to transfer authorization to the end-user to close the

ticket upon their satisfaction. P3 implemented a monitoring process for all customer calls

to the supplier's help desk and examined customer-survey samples from approximately

80,000 calls per month; P3 then made customer satisfaction the main performance metric.

P3 introduced the concept of critical service levels (CSLs) which are performance

measurements for which the client may impose financial penalties for infringements or

award bonuses for exemplary performance. P4 also introduced KPIs which although

important did not carry any associated financial consequences. P4 felt that the

outsourcing contract should be flexible to revise the KPIs over time, because some of

parameters the client measured affected no change to the outsourcer's behavior.

In contrast to SLAs, P5 implemented the concept of Service Level Objectives

(SLOs), atypical of an ITO contract. The SLOs were supplier performance targets the

company's executives chose to measure and for the supplier to meet and exceed without institution penalties. P5 stated that SLAs with penalties and bonuses introduced unproductive emotions to the client-supplier dynamics, inconsistent with the manner in which they managed their suppliers.

Another governance mechanism that contributed to P5's success was during a large outsourcing transition program the client company had many inflight projects that were part of the outsourcing scope. P5 formed a committee of stakeholders consisting of executives and delivery leaders who met regularly to review the status of their top 40 inflight projects. If less than 10% of the 40 inflight were a red status, then the committee considered the transition status acceptable given the massive scope of the ITO project.

In contrast to all other participants, P7 advised that the key to an outsourcing arrangement is not to place focus on governance and performance measurements, but to find a balance that results in benefits to the client and the vendor over the long term, through innovation and automation. Similarly, P9 advised to spend less time on governance and more time on the deal dynamics, mutually agreed principles, desired outcomes, transparency, incentives, and then allow the lawyers and technical team to align the contract to these principles. P9 cautioned that if the parties do not spend enough time on these matters, the client-supplier dynamics will turn into a technical and confrontational discussion where teams lose sight of what they wish to achieve and the discussion will become a service-by-service negotiation which ultimately will result in customer dissatisfaction.

Trust. All participants commented on the importance of a trusting relationship

and stressed what in their experience constitute trust. P1 stated that the objective of the outsourcer was to start building a purposeful relationship with the client with the aim to drive customer satisfaction even prior to the transfer of IT responsibilities to the outsourcer. P1informed that both the client company and the outsourcer agreed on the principle that without trust the relationship will be argumentative and unlikely to succeed. Trust means consistency over time in credibility and transparency. P2 emphasized the importance of trust and explained during the first 12 months of the outsourcing relationship, there was a complete lack of trust until both sides began to make concessions, compromises, and frequent communications on how to make partnership successful.

P3 emphasized the importance of finding an outsourcer that the client can trust and not rely on contractual SLAs and KPIs to manage the outsourcer's performance. P3 recommended that clients take the time necessary to consider the best players in the market, conduct customer reference checks, and hire a trustworthy supplier. P4 postulated that developing a face-to-face relationship instead of working over the phone or digital media helps to develop trust. In P4's view trust from a pragmatic standpoint means that the client does not need to perform an audit on the outsourcer's reported metrics and can be confident the supplier will deliver well on their obligations.

P6 defined trust as doing the right thing within the context of the contract in a manner that will render performance terms and conditions irrelevant. P6 explained that trust in a partnership means all parties to the contract will do what they promised, which amounts to credibility beyond a legal construct. Intertwined in credibility is competence

and capability, and a flare for delivering with passion, and continuous improvement.

P7 recommended to begin the client-supplier relationship from a position of trust instead of distrust, and then through client observations, actions, that trust can be lost. P7 explained that trust includes transparency and action, and every action is a moment of truth. For example, if the outsourcer misses an SLA, the action of being transparent and explain why they missed the SLA, then the outsourcer's behavior forms an action of trust (P7).

P8 stated that trust begins at the very first client-supplier interaction, and trust is important to supplier transparency of risks and issues not indicative with SLAs and KPIs. If trust is absent, the supplier may compose their measurement reports to a story they wish to tell (P8). P8 advocated that client-supplier team building at professional and personal levels will help the process of constructing trust from top to bottom.

P9 defined trust as ultimately thriving to an outcome beyond the contract. Trust therefore means open dialogue, compromises, understanding the clarity of the outcomes and incentives that are important to both parties (P9). Frequency of communication is another ingredient of trust because P9 associated trust with frequent client- supplier communications. P9 emphasized that reciprocity is also an ingredient for trust in which the supplier's actions are in the interest of the client, and their interests secondary.

Employee engagement. P7 reinforced the importance of engaging employees to explain the anticipated benefits from ITO, otherwise they will not comprehend the expected value. In P7's company, employees included the leadership team, customer relationship managers, developers, the solutions engineering team, the infrastructure

team, and all in the technology delivery function. To protect and retain a company's

intellectual capital (IP) and not risk losing all their important IP, P7 explained the

importance of including in the ITO contract, the names of critical IT employees the

outsourcer must agree to inherit, and to keep key human resource capital for a specified

period during the contract term, in interest of the client's business operations.

P5 mentioned that one of their ITO successes was their ability to find

opportunities for all impacted employees. P5 explained that they rebadged approximately

50 employees to the outsourcer, placed 65 in a pool for rebadging to the supplier, and

offered the option to receive a termination package or seek other opportunities.

Management deployed this model to other parts of the organization given the positive

outcomes and employee comments (P5). P5 articulated that their employee engagement

model extended beyond their employees to those from the supplier's organization who

were critical to the success of both the client company and the supplier, and named these

individuals explicitly in the ITO contract for maximum retention.

P8 remarked that one of the most critical ITO successes was spending time with

the internal IT employees to explain why outsourcing was the way forward. P8 stressed

the importance of upfront transparency with internal IT staff and held frequent

conversations with employees to help them stay motivated because they continued to

have questions as the process progressed. P8 mentioned the criticality of transparency of

the potential outcomes of employees as to who will and who will not have jobs at the end

of the transition process. P8 suggested that the success of selling and persuading the

internal team resulted in employee cooperation which led to the successful transition of

work to the supplier; conversely failing in this area would result in failure in the transition process.

Another critical factor that led to success was to have the outsourcing vendor team and the internal team build relationships. P8 mentioned that they failed to do the same with other departmental employees, causing misalignment, distrust, resistance, and a difficult journey with tremendous management effort to overcome these obstacles. In the end, management deemed the transformation a success and a large step forward in terms of meeting the company's strategic global structure for IT services.

Applications to Professional Practice

The four themes from this study consist of the following: (a) strategic intent for outsourcing, (b) applicable frameworks, (c) risk awareness, and (d) partnership strategies. The results from this study contain valuable information and insights into strategies that may help IT managers in in Southern Ontario, Canada, successfully outsource their IT services to ensure customer satisfaction. The findings may also contribute to the overall ITO body of knowledge and improve ITO business practices by identifying ITO risks and challenges and offering strategies to increase the success of ITO initiatives.

The findings from investigation into the rationale for ITO contributes to professional practice by adding to the increasing reasons of why executives outsource to achieve sustainability, growth, and customer satisfaction. For instance, company executives who are more experienced in ITO may consider outsourcing as the first step in transitioning from insourcing to cloud computing; other executives typically outsourced for the sole reason of lowering operating costs (Pankowska, 2019)

The investigation into applicable frameworks may aid business leaders regarding which specific IT services to outsource and the process to choose a qualified supplier. The findings may contribute to professional practice by alerting business leaders to the drawbacks of applying ITO frameworks, as well as the need for improvements in this area of practice. The findings may also suggest that business leaders and ITO practitioners should moderate the decisions emanating from the use of these frameworks and synthesize other pertinent information to advance the robustness of their decisions.

The findings from the study contains valuable information on risks and challenges. Business leaders and ITO practitioners may incorporate these risks and challenges into a comprehensive risk management plan to help mitigate threats and improve the success of their ITO initiatives. Mandran and Dupuy-Chessa (2018) stated that the field of ITO is complex, risky and uncertain; Gewald and Schäfer (2017) emphasized the importance of managing risks as an essential element to ITO success. The risks and challenges in this study may contribute to professional practice by providing information to improve the comprehensiveness of ITO risk management programs.

The partnership strategies in the findings may contribute to professional practice by providing: (a) synergistic approaches to work collaboration, (b) pragmatic trust principles to improve client-supplier dynamics, (c) governance measures for performance improvements, and (d) change management strategies for employee engagement during the ITO processes. Information Technology managers' knowledge of what strategies worked and did not work, and the recommendations from expert participants may avoid

disputes between client companies and suppliers, offer new paradigms in building trust, and align client and supplier employees to work as a cohesive unit. According to Park and Panagopoulos (2019), legal disputes remain costly to both the client and the supplier. The strategies in the findings may help business leaders and ITO practitioners avoid disputes and focus on ITO success and customer satisfaction.

Implications for Social Change

The four themes in this study represent ITO strategies which together contribute to business success with positive social impacts to economies, communities, and societies. Information technology outsourcing is a restructuring strategy to increase the competitive advantage and success of an organization (Buttazzoni, Arku, & Cleave, 2019); successful companies contribute substantially and impactfully to economic development (Cleave, Arku, Sadler, & Gilliland, 2017). Corporate social responsibility (CSR) includes sustainability practices that successful companies mandate to positively affect people and their communities (Li et al., 2016).

The first theme from my study focused on the strategic intent and compelling reasons clients embark on ITO to achieve a competitive advantage. The second included applicable frameworks to help business leaders decide what specific IT services to outsource to achieve the expected value from ITO. The third theme focused on risks identification and awareness for risk mitigation planning to achieve ITO success, and the fourth theme outlined successful partnership strategies to ensure success and customer satisfaction.

The potential impact of successful client companies includes the following: (a) job stability, (b) new employment opportunities, and (c) economic development. Economic development promotes productive communities and alleviates the anxieties of job insecurity (Snorradóttir, Tómasson, Vilhjálmsson, & Rafnsdóttir, 2015). The success of ITO in the client's economy may increase the demand for suppliers' resources typically situated in developing economies (Patil & Wongsurawat, 2015). Countries in developing economies include (a) India, (b) China, (c) Africa, (d) the Middle East, and (e) Eastern Europe.

Kannothra et al. (2018) described supplier companies in developing and emerging economies as impact sourcing service providers (ISSPs). The ISSPs specialize in hiring individuals in marginalized communities to deliver low cost, high-quality services using ICT to deliver digitally enabled work (Kannothra et al.2018). Eskelund, Heeks, and Nicholson (2019) found that employment through ICT in marginalized communities increased employees' self-confidence, and how the community perceives them. Employment in marginalized communities have positive and direct impacts to employees, their families, their communities, and the local economy (Malik & Nicholson, 2019). As business leaders from client companies in developed nations form strategic relationships with ISSPs, both parties have the potential for multicultural integration with a better understanding of languages, customs, norms, and values.

Recommendations for Action

Several interest groups exist who may pay attention to the results of this study and apply the recommendations to their ITO initiatives. These groups include (a) ITO

advisory firms, (b) executives, (c) IT managers, (d) risk managers, (e) business process owners, (f) program managers, (g) audit personnel, and (h) readers who can relate the results of this study to their own ITO experiences. The four themes in the study include (a) strategic intent for outsourcing, (b) applicable frameworks, (c) risk awareness, and (d) partnership strategies. The recommendation for action by each team follows below.

There are several actions business leaders, IT executives, and managers may select to improve their ITO strategies to ensure success and customer satisfaction based on the findings of this study. First, executives currently insourcing their IT services may consider ITO as part of their strategic intent for a competitive advantage. Second, executives currently outsourcing their services may revisit their decisions to confirm the expected benefits and make modifications (add, change, or remove) IT services as appropriate by renegotiating the ITO contract with the supplier, backsourcing, or re-sourcing specific IT services.

To determine exactly what IT services to outsource, IT managers, financial analysts, business process owners, and executives, may use applicable ITO frameworks as a structured way to help with their decisions on the specific IT services to outsource. Users and consumers of the results must be fully aware of the inherent flaws with the frameworks and moderate their decisions with other corroborating information. To select a competent supplier to execute on the delivery of IT services, managers and executives with a strong Procurement Department may use vendor-decision models such RFI and RFPs; others should retain an experience advisory firm to lead the vendor-selection and due-diligence processes.

Executives and managers from both the client and supplier companies should adopt ITO risk awareness and risk management strategies, including continuous monitoring, risk identification, and risk mitigation with measurable action plans. Executives, IT Managers, and risk managers should incorporate the risks and challenges in this study into their enterprise risk management plans. Management's execution of the risk management strategies could help avert negative outcomes and support the attainment of ITO success and customer satisfaction.

Several client-supplier partnership strategies from the study may interest executives and IT managers. First, all delivery personnel from the client and supplier should focus on deal principles and innovations to achieve gainsharing that benefits both parties. Second, executives from the client and supplier companies should agree and execute flexible governance strategies consisting of SLAs and SLOs congruent with the client's ITO goals. Third, executives should implement change management activities to aid all delivery client and supplier employees to adopt the trust principles in the study. Fourth, executives and IT managers should actively engage their employees from the very outset to ensure organizational alignment to the ITO goals, and retain key employees to ensure the ongoing success of business operations.

Yuan, Chu, Lai, and Wu (2020) found that knowledgeable workers contribute significantly to outsourcing success. Workers knowledgeable on ITO exist on both the supplier and client organizations. Several participants expressed interests in the finished paper and requested distribution by email. I will offer the findings to local ITO interest groups and professional organizations in Southern Ontario, Canada; these include The

Canadian Association of Management Consultants consisting of approximately 2000

members of Certified Management Consultants, and The Centre for Outsourcing

Research & Education (CORE). These organizations foster information exchange

through speaking engagements, conferences, and business forums. For a wider audience,

considerations will include publication in technology and business journals, including:

The Journal of Information Technology, The Journal of Management, and *The Journal of*

Management Science.

Recommendations for Further Research

To investigate if these findings are generalizable, future researchers should

conduct a similar study across a broader population consisting of different industries and

cities across North America. Researchers may use mixed methods to combine qualitative

and quantitative approaches with a large data set to determine correlations and

substantiation of findings. The mixed method research approach would permit deeper

exploration and broader scope on answers to questions on ITO strategies to ensure

success and customer satisfaction.

The four themes from this study consisted of the following: (a) strategic intent for

outsourcing, (b) applicable frameworks, (c) risk awareness, and (d) partnership strategies.

An outlier finding from strategic intent was that ITO positioned companies for faster

transition to cloud computing. Further researchers may explore ITO approaches to

enable transformation and optimization of IT services to cloud computing as a strategy

for companies to achieve a competitive advantage.

The study confirmed Jia et al.'s. (2017) findings regarding the scarcity of research

into integrated frameworks to assist IT managers to improve ITO success. Participants

who applied cost-benefit models to support their ITO business cases did not realize the

expected benefits. Foerstl et al. (2016) warned of the many flaws with cost-analysis

models. Further research to help develop new and improved ITO frameworks may

provide a more accurate prediction of ITO outcomes to aid in the ITO decision-making

process.

The findings of the study remain consistent with Dhillon et al.'s. (2017) argument

that ITO is abundant with risks and challenge. All participants experienced significant

risks and challenges: (a) contract misinterpretations, (b) stakeholder's misalignment on

ITO requirements, (c) client outsourcing inexperience, (d) organizational misalignment

on the ITO strategic benefits, and (e) lack of supplier competence. Further research into

the fundamentals of continuous risk identification and risk management strategies with

deep exploration into the ITO areas above may help IT managers take corrective action to

achieve success and customer satisfaction.

The investigation into partner strategies focused on four main areas: (a) positive

client-supplier dynamics, (b) governance, (c) trust, and (d) employee engagement. On

client-supplier dynamics, further research into the importance of innovation to increase

productivity, and how both parties could share the benefits of innovation, may help

structure the relationship to achieve ITO success. Regarding governance characteristics,

further research with deeper exploration into the impacts of SLAs and SLO, and how IT

managers may optimize these tools in combination, may help enhance the supplier's

performance. All participants in the study emphasized the importance of finding a

trustworthy outsourcer although no participant made this determination in advance of contract signing. Further research into the characteristics of trust and how client and suppliers can detect the ingredients of trust that cascade from the executive levels to the working levels may help to avert an impending hostile relationship.

Participants in this study expressed the importance of engaging employees to explain the benefits to the company on the value of ITO. Participants made every effort to protect and retain key employees to protect the company's IP, however key employees left the company's organization. Further research to investigate employees' attitudes and reactions to ITO, and how to improve the employee engagement process to benefit the employees of the client and the supplier, may help achieve success and customer satisfaction.

Reflections

The participants in this study were IT professionals with many years of ITO experience, and a rich source of valuable information. All participants contacted were passionate about the topic of ITO and responded favorably to requests for an interview; two very experienced potential participants could not engage because of business travel and work commitments. However, nine interviewees were sufficient to reach data saturation.

Interacting with ITO practitioners presented a tremendous learning opportunity; the interview protocol was especially useful in helping with consistency in questioning, probing, and collecting of information in a structured manner. Conducting the interviews, listening carefully to participants, and member checking were critical to

correct interpretation and validity of information. The responses to questions and the

participants' experiences in the field of ITO were enlightening, informative, and

inspirational. I bracketed myself and did not influence the participants' responses;

consequently, there was no need to declare a statement of conflict of interest.

Transcribing the interviews and having to oscillate between the recordings and

capturing the interview data took much longer than predicted. I found that the analysis

and synthesis of information began at the time of transcribing the recorded conversations.

The entire DBA process was a protracted, detailed, and expensive proposition, requiring

time, effort, energy, and a strong network of support from family, friends, and faculty

members. This journey was one I will always remember.

Conclusion

The research objective of this study was to explore what ITO strategies managers

in Southern Ontario, Canada, applied to ensure customer satisfaction. Given the

complexity of ITO, the choice of the design approach was a qualitative multiple case

study. According to Yin (2014), a multiple case study is appropriate to explore different

aspects of a complex business phenomenon. A multiple case study helps in investigating

similarities and dissimilarities among different participants to uncover rich information

about the phenomenon (Mysore, Elmualim, & Kirytopoulos, 2019).

The study consisted of exploration into the lived experience of nine IT

professionals in Southern Ontario, Canada, with years of practice in ITO engagements.

Mason (2010) posited that a small sample size of six participants can achieve data

saturation. In addition to valuable information from the nine experienced participants,

this study included pertinent artifacts and prestigious literature-review articles to achieve methodological triangulation and data saturation.

Findings in this study revealed several valuable areas to improve the ITO body of practical application of strategies for success and customer satisfaction. The findings included the client-supplier dynamics focused on deal principles, innovation, and high work collaboration that contributed to customer and stakeholder satisfaction. Executives who used a governance approach with emphasis on SLOs with no financial penalties averted a non-confrontational relationship and enabled constructive action planning for early remediation of performance issues. Every interaction between the client and supplier was an opportunity to build and reinforce key trust principles essential to a long-term ITO relationship; without trust the ITO arrangement was difficult and unlikely to succeed.

The participants' definition of trust included the following: (a) credibility, (b) transparency, (c) competence, (d) consistency of acceptable performance, (e) frequent collaboration, and (f) action planning and execution to deliver on the outsourcer's promise to the client company. Executives should not embark on any ITO strategy unless key stakeholders align to the value of the strategy and implement change management to avoid strong resistance or outright failure. All participants experienced significant challenges regardless of the use of ITO frameworks and vendor decision models for ITO decision making. The study was limited to Southern Ontario, Canada, and the results may not be generalizable; a broader North American geographical scope may yield more substantive results.

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Appendix A: Interview Protocol

1. Ensure meeting logistics and equipment arrangements are in place (a) schedule
   meeting date, time and place to meet with participants; (b) ensure meeting rooms are
   booked; (c) take recording device, batteries, computer, and note pad to meetings.

2. Obtain signatures for the consent form, and provide a hard copy to the participant,
   retain one copy for the research files. Ensure the participant understands the terms on
   the consent form.

3. Prepare participants for the interview, reminding them that I will be taking notes and
   recording the interview. Help make the participant comfortable and stress the
   importance of providing as much information as possible, whether positive or
   negative. Emphasize the objective of the study is to understand the participant's lived
   experience, perspectives, views, and insights on their ITO strategy, the impacts to
   customer satisfaction, and the successes, challenges, and failures of the ITO strategy.
   Help participants tell a narrative and not just answer the interview questions.

4. Interview questions:

   a. What is/was your role, responsibility, and involvement with outsourcing of IT
      services?

   b. What specific IT services are/were you involved with in the decision-making
      process?

   c. What were the processes, frameworks, or methods used to determine what
      specific IT services to outsource?

   d. What were the reasons for outsourcing these services?

e. What specific processes were put in place to select the outsourcer/vendor organization?

f. What was successful about outsourcing the IT services, in terms of customer satisfaction, and other performance indicators?

g. What challenges did you face in outsourcing the IT services?

h. What more information can you provide that will help other IT managers successfully outsource to ensure customer satisfaction?

5. Conduct a debrief segment, soliciting concerns, amendments, or exclusions to the information provided during the interview process. Request pertinent documentation or materials the participant is prepared to offer. Pursuant to participant /management approval, request the participant's permission, method, and timing for follow-up questions, and names of persons within the participant's organization who can answer important queries in the event the participant cannot do so. Schedule a follow-up meeting, in short order to conduct member checking.

Appendix B: RFP Table of Contents

Appendix C: Client Satisfaction Service Level Agreement

FY18 - October   Service Summary

Technology Availability Metrics

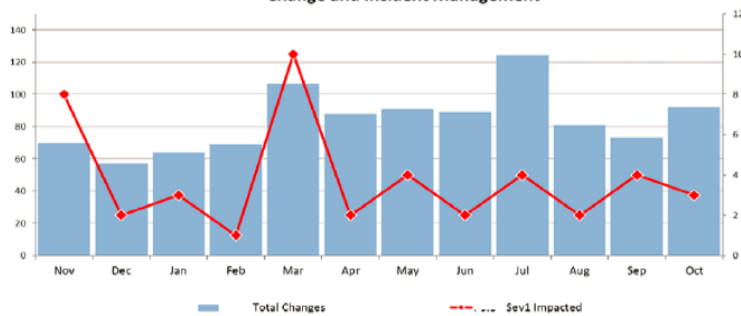|	Oct	YTD TOT FY18	FY17	YTD AVG FY18	FY17	+/-
Severity 1s	3	45	57	3	5	⬇
Avoidable	1	12	16	1	1	⬛
Major	3	33	32	3	3	⬛
Outage Mins	31	4048	3833	337	319	⬆

	Oct	YTD TOT FY18	FY17	YTD AVG FY18	FY17	+/-
Total Changes	92	1005	990	84	83	⬆
Emergency	10	130	110	11	9	⬆
Expedites	18	197	158	16	13	⬆
Total Success Rate	97.83%	--	--	98.41%	96.16%	⬆

Success Rate Target (97.5%)

Change and Incident Management

Client Impact	Technology Themes	Improvement Opportunities