

MIDDLE MANAGEMENT LEADERS AND THE MATRIXED ORGANIZATION

by

Donald K. Stephens

Doctoral Research Project – Case Study

Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Strategic Leadership

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Abstract

The purpose of this qualitative case study was to explore the pivotal and challenging role that middle management leaders have in leading and managing matrixed teams within a matrixed organizational structure. The specific problem to be addressed was the possible inability of middle management leaders to lead effectively within the information technology (IT) industry where a matrixed organizational structure has been implemented resulting in ineffective teams that do not benefit an organization in achieving its strategic objectives. The outcome of the research and study were to contribute to the body of knowledge and to reduce the gaps in the literature by expanding on the understanding of middle management leaders and their pivotal and challenging roll leading and managing teams within a matrixed organizational structure. The study included 15 one-on-one interviews resulting in seven discovered themes. The seven themes that were discovered in conjunction with the existing literature provided key insight and applicable implementation strategies that can be utilized by middle management leaders that are leading and managing matrixed teams within a matrixed organizational environment and by matrixed organizations in order to better equip their middle management leaders. The conclusion of this study suggests that the challenges faced by middle management leaders can be overcome when proper steps and actions are taken and implemented by both middle management leaders and their matrixed organization.

Keywords: middle management leader, matrixed organization, matrixed team

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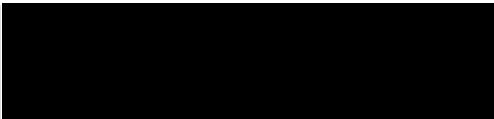
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Dedication

First and foremost, I would like to thank my Creator for giving me the ability and strength to complete my doctoral journey. Second, I would like to thank my wife and two children for encouraging and supporting me throughout the course of the past three years to press on and complete my doctorate. Especially during those times when I wanted to give up and quit. Last but not least, I would like to thank Dr. Jolly for his guidance, valuable feedback, and encouragement throughout this entire process.

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Section 1: Foundation of the Study

Introduction to the Study

In today's modern and fast paced business environment, top level organizational leaders are unable to be actively involved in the day-to-day operations and management of the different divisions and departments within their organization due in part to the demanding and ever-changing environment that businesses find themselves competing and operating in. Therefore, top-level leaders rely heavily upon their middle management leaders to oversee the day-to-day operations of the organization and to ensure that their policies and directives are implemented and practiced throughout the organization (Duncan, 2019). In times past, when the business environment was not constantly changing day-to-day and not so fast paced, organizational leadership and management was achieved through traditional hierarchal organizational structures where all employees and teams within a division or department worked for and reported to one singular manager (McPhail, 2016). However, in response to a changing and more complex business operating environment that began to arise during the 1970's and 1980's, many businesses and organizations adopted and implemented a matrixed organizational structure in order to achieve greater efficiency, better meet the needs and demands of their customers, and to relieve top level leaders from having to personally manage and oversee the day-to-day operations of the divisions and departments within their organization (Pakarinen & Virtanen, 2016).

The following information within section one laid the framework for this study on middle management leaders and the matrixed organization by providing the reader with background information of the problem, the specific problem statement, and with the purpose for why this study should be conducted. Additionally, four research questions were presented that formed the basis of inquiry for this study and that helped guide the researcher in addressing the problem

statement. Following the research questions, the nature of the study was discussed as it pertains to the research paradigm, design, method, and triangulation. Additionally, the research framework as it pertains to the concepts, theories, actors, and constructs were also presented and discussed. Key definitions and terms were provided in order to enhance the reader's understanding of the research study material. Identification was then made of the assumptions, limitations, and delimitations that impacted this study, which then leads into the significance of the study as it related to the gaps in the literature, biblical integration, and leadership practices.

In section two, the researcher presented the methodology that was utilized for the project and specifically detailed why a flexible and single case study design were appropriate for this study. The researcher also presented the appropriateness of the chosen methods for triangulation. Specific details were also discussed regarding how data was collected, organized, and analyzed. Additionally, information was presented and discussed that focused on the population and sampling along with the reliability and validity of the data and research.

In section three, the presentation of the findings identified seven key themes that were discovered during the course of the study and included relevant quotes and material from study participants. The researcher elaborated on the relationship of the findings and themes as they related and pertained to the studies research questions, research framework, anticipated themes, and literature review material. Additionally, based upon the findings and discovered themes of the study, potential implementation strategies and ways to improve general leadership practices were provided by the researcher along with recommendations for further studies. Finally, upon completion of the study, the researcher reflected upon his own personal and professional growth and provided both a biblical perspective and summarized conclusion of the findings, discovered themes, and overall study.

Background of the Problem

Prior to technological advances, a majority of businesses operated within a standard hierarchal organizational environment and structure where a dedicated group of employees and teams worked for one single manager (McPhail, 2016). However, with the passing of time and advances in technology that have taken place since the 1970's and 1980's many organizational leaders have shifted their organizations away from a standard hierarchal structure to a matrixed structure in order to be more efficient and effective (Pakarinen & Virtanen, 2016). This shift in organizational structure has had the greatest impact on middle management leaders as they are the organizational leaders on the ground responsible for implementing the strategic vision of top leadership by working across the various different matrixed and functional areas within the organization (Iasbech & Lavarda, 2018). This responsibility can be a challenging and daunting task for middle management leaders as they seek to put the strategic plans of top organizational leaders into successful action across the matrixed teams and functional areas that they are personally responsible for leading and managing (Duncan, 2019). Due to such, it is necessary to study and research the middle management leader's role more extensively in order to provide specific information and data related to the significance of middle management leaders and their role in leading and managing employees and teams within a matrixed organizational environment.

Problem Statement

The general problem to be addressed is the inability of middle management leaders to lead effectively within a matrixed organizational structure resulting in poor organizational performance. Nagini et al. (2020) stated that the matrixed organization is a complex organizational structure that shares organizational employee and team resources between two

different reporting heads, which leads to frequent communication issues and challenges in lower levels of the organizational structure and misalignment of goals making it difficult at times for middle management leaders to lead effectively. Additionally, Duncan (2019) noted that top organizational leaders rely heavily upon middle management leaders to oversee the day-to-day operations of the organization and to ensure that organizational policies and directives are implemented and practiced throughout the organization by employees and teams. Isabech and Lavarda (2018) supported this notion by indicating that middle management leaders, as the individuals within the matrixed organization that have been given the pivotal and challenging task of leading shared employee and team resources across different organizational areas, struggle to lead these resources effectively due to the unique organizational nature and structure that the matrixed organization utilizes and practices. The specific problem to be addressed is the possible inability of middle management leaders to lead effectively within the information technology (IT) industry where a matrixed organizational structure has been implemented resulting in ineffective teams that do not benefit an organization in achieving its strategic objectives.

Purpose Statement

The purpose of this qualitative research study will be to explore the pivotal role of middle management leaders in leading employees and teams within a matrixed organizational structure. As Duncan (2019) noted, it is the top-level leaders that create the strategic objectives, policies, and directives for an organization, but it is middle management leaders that are responsible for bringing employees and teams together to achieve those strategic objectives and to ensure organizational policies and directives are followed. Therefore, due to the changing landscape in the number of organizational structures that have transitioned and are transitioning from a

traditional hierarchy leadership model to a matrixed organizational structure, there is a need to study more closely the middle management leader and their role within the matrixed organizational environment. While a considerable and valuable amount of research has been conducted separately on the topics of middle management leaders, the leading and managing of teams, and on matrixed organizations, there has been very little research conducted on the pivotal and challenging role that middle management leaders play in leading and managing employees and teams within a matrixed organizational structure. This study will seek to explore and research the gap that currently exists within this specific area.

Research Questions

RQ1: In what ways do middle management leaders within a matrixed organization differ from top level organizational leaders?

RQ2: How does the matrixed organizational structure impact the ability of middle management leaders to lead effectively?

RQ3: In what ways does a matrixed organizational structure inhibit team effectiveness?

RQ4: What cultural elements are present in the information technology (IT) industry that makes it challenging for middle management leaders to lead effectively inside of a matrixed organization?

Nature of the Study

The purpose of this qualitative study is to learn about middle management leaders and the challenges they face in effectively leading employees and teams within a matrixed organization. Tomaszewski et al. (2020) define qualitative research as the collection, analyzation, and interpretation of non-numerical data. They further note that the benefit of a qualitative research design is that it allows for the researcher to develop a deep understanding of the research subject

or phenomena that is being studied rather than the researcher having to predict results or outcomes. Specifically for this study, the researcher utilized a social constructionism research paradigm as their lens by which to interpret and evaluate the data that was collected. Additionally, for the methodology the researcher utilized a flexible single case study design using qualitative methods.

Discussion of Research Paradigms

Kivunja and Kuyini (2017) define research paradigm as the abstract beliefs and principles that define the researcher's worldview and the lens through which the researcher examines and evaluates data. When conducting research, there are four primary research paradigms that a researcher may choose from, these include positivism, post-positivism, constructivism, and pragmatism. Positivists and post-positivists hold to the belief that there is a single reality that can be measured and known (Kivunja & Kuyini, 2017). A key difference between the two is that the positivist believes that the researcher and participants are independent of each other in thought and interpretation of what is observed, while the post-positivist believes that the researchers background, values, and knowledge can influence the interpretation of what is observed (Robson & McCartan, 2016). Additionally, the constructivist believes that there is no single truth or reality, and that reality needs to be interpreted; while the pragmatist believes that reality is constantly changing and being interpreted (Kivunia & Kuyini, 2017).

For this research study, the researcher chose to utilize the paradigm of social constructionism. Robson and McCartan (2016) define social constructionism as knowledge that is developed as a result of social interaction and engagement that is focused on how individuals construct and make sense of their environment and the world in which they live, work, and function. They also note that the paradigm approach of social constructionism places a strong

emphasis on the social situations and experiences of individuals as those social situations and experiences are lived, felt, and undergone in the day to day lives of individuals. Furthermore, as it pertains to organizations and their professional practices, social constructionism can provide organizational leaders and practitioners with useful resources obtained through dialogue, imagination, meaning making and other such items to enhance and transform organizational culture and positively impact organizational development (Camargo-Borges & Rasera, 2013). Therefore, as it pertains to this study, it is through the research paradigm of social constructionism that a framework is provided in which the human experiences of middle management leaders within a matrixed organization can be properly studied, evaluated, explored, and understood.

Discussion of Design

When conducting research, a researcher can choose to utilize either a fixed, flexible, or mixed method design. Robson and McCartan (2016) note that the fixed research design is primarily practiced in quantitative research, utilizes an experimental approach, and is best suited to study scientific areas within the social sciences that require numerical information and data. Additionally, they define flexible design as an adaptive type of research used in qualitative studies that allows the researcher to adjust or modify their research approach as the research evolves and as the researcher acquires greater amounts of information. They also indicate that it is best suited to study social or human problems that require social inquiry and interaction with the studies participants. The third design of mixed methods incorporates a combination of both a fixed and flexible design and is best suited to study areas where the researcher desires to obtain scientific quantifiable data along with social and emotional data from participants (Timans et al., 2019).

For this qualitative research study, a flexible design was the most appropriate design to utilize as it allowed for the researcher to have the flexibility to adjust and modify their research approach as the research evolved and as greater amounts of data were obtained. Additionally, it was the best choice as the flexible design required the researcher to be flexible and adaptive to the research, while also requiring the researcher to possess the qualities of being open minded, a good listener, and sensitive to the data and information that is gathered from participants (Robson & McCartan, 2016). Due to such qualities and traits of the flexible design, it was most appropriate for the researcher to implement this design when collecting data and information from middle management leaders. Of note, a fixed design was not a good choice for this study as such a design is unable to capture the subtleties and complexities of individual human behavior (Robson & McCartan, 2016), nor was the mixed method design a good choice due to the fact that scientific quantifiable data was not be sought after for this study.

Discussion of Method

Within qualitative research studies, there exists the five primary research methods of narrative, phenomenology, grounded theory, ethnography, and case study. The narrative research method is used by the researcher to tell a story and is best suited to study specific life experiences or events that have been lived by an individual participant (Creswell & Poth, 2018). The phenomenological research method is used to describe and interpret the lived experiences of a phenomenon that a group of individuals have in common, allows for the researcher to better understand the topic that is being studied by viewing it from the perspective of the participants and is best suited to study from the perspective of the actual participants (Creswell & Poth, 2018). The grounded theory research method seeks to gather information from a large group of individuals through the use of interviews as it pertains to a process or action that the group has

experienced and is best suited for studies where the researcher desires to provide an explanation on the process or action experienced in order to possibly develop a new theory (Creswell & Poth, 2018). Additionally, the ethnographic research method seeks to study and observe a large culture-sharing group that interacts regularly with one another and is best suited for studies where a researcher desires to describe and interpret the shared beliefs, behaviors, and languages of a specific group (Creswell & Poth, 2018). Finally, the case study research method, which is the method that was utilized for this study, seeks to explore and develop an in-depth and detailed understanding of a case or cases over time and is best suited to study a specific case or specific cases that a researcher wishes to develop a greater in-depth understanding and knowledge of (Creswell & Poth, 2018).

Discussion of Selected Method

This study was conducted with a flexible design using qualitative methods, specifically, a single case study was used. Tomaszewski et al. (2020) define qualitative research as the collection, analyzation, and interpretation of non-numerical data. They also note that the benefit of a qualitative research design is that it allows for the researcher to develop a deep understanding of the research subject or phenomena that is being studied rather than the researcher having to predict results or outcomes. Additionally, Creswell and Poth (2018) define case study as the study of a case pertaining to a single individual, small group, or organization within a real-life context or setting. They also note that that single case study research allows for a qualitative approach in which the researcher can investigate and explore a real-life case over time in a detailed fashion while collecting in-depth data and material. Furthermore, Robson and McCartan (2016) define flexible design as an adaptive type of research that allows the researcher to adjust or modify their research approach as the research evolves and as the researcher acquires

greater amounts of information. It is also mentioned by Robson and McCartan (2016) that the flexible design requires the researcher to be flexible and adaptive to the research, while also requiring the researcher to possess the qualities of being open minded, a good listener, and sensitive to the data and information that is gathered from participants. This was the appropriate methodology for the researchers chosen study as it allowed for the lived experiences of middle management leaders working within a matrixed organization to be studied and researched via the means of a flexible design using qualitative methods that allowed for the research process to evolve as greater amounts of information and data were gathered and obtained.

Discussion of Triangulation

Triangulation is used by researchers to provide corroborating evidence that can be used to validate the findings and accuracy of their study (Creswell & Poth, 2018). For the purpose of this study, triangulation was achieved through the means of one-on-one interviews, observations, and document analysis. Additionally, a majority of the data for this study was gathered through the means of purposive criterion sampling which involves identifying and selecting participants that have shared in the lived experience or phenomenon that is being studied (Moser & Korstjens, 2018). In this case, this was middle management leaders that were responsible for leading and managing teams within a matrixed organization. Additionally, the specific means of data gathering, in order to obtain input and answers to the four research questions, was conducted through the means of one-on-one interviews and observations. Creswell & Poth (2018) note that for the collection of data within a single case study design, the researcher should select one bounded case and conduct one-on-one interviews with three to five individuals that have all experienced the lived experience and, if needed, gather additional information through observation. In conducting the research this way, it allowed for the problem statement regarding

the lived experiences of middle management leaders and their ability to lead teams effectively within a matrixed organization to be studied and researched in a meaningful and beneficial way.

Research Framework

The research framework of a research study is the foundational element upon which all knowledge is constructed as it pertains to the specific topic and area of study (Grant & Osanloo, 2014). For this specific research study, the research framework consisted of key theories, concepts, actors, and constructs, each of which were vital elements to the total and complete research framework. Each key element was connected to the follow-on key element and produced a cyclical framework that tied the theories, concepts, actors, and constructs all together into one applicable framework. The following framework diagram provides a visual representation of this cyclical framework structure and flow.

Framework Diagram

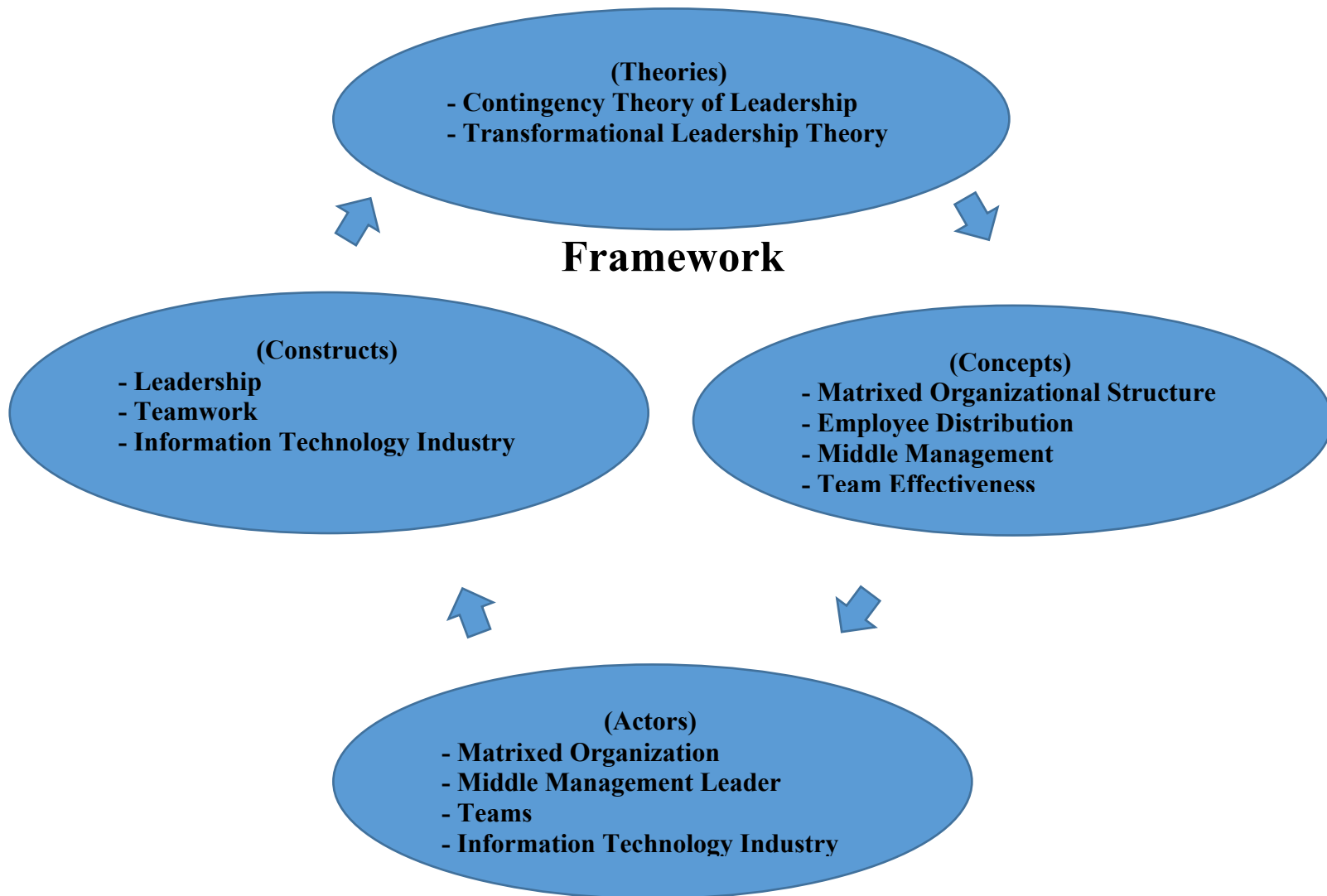


Figure 1. Theoretical Framework Diagram

Discussion of Concepts

The primary concepts relevant to this research study included matrixed organizational structure, employee distribution, middle management, and team effectiveness. Each concept was vital to the research and connected to the specific problem. The matrixed organizational structure is a complex organizational concept that seeks to be both effective and efficient by accomplishing more with less resources (Dunn, 2015). This concept was directly related to the

specific problem as the matrixed organizational structure is the driving force that impacts the ability of middle management leaders to lead their matrixed teams effectively. Also of note, the concept of employee distribution, within the matrixed organization, consists of employee resources being shared across different teams and departments within the organization in order to achieve greater efficiency and effectiveness in accomplishing different projects and operations (Pakarinen & Virtanen, 2016). This concept was related to the specific problem in that the findings of the study found that the sharing of employees has the potential to produce matrixed teams that are ineffective. Additionally, the middle management concept involves the level of management on the ground, within a matrixed organization, that must work across the different matrixed and functional areas of the organization in order to implement the strategic vision of top leadership (Iasbech & Lavarda, 2018). This concept related to the specific problem as the findings of the study found that middle management is the leadership level at which the specific problem focused on as it pertained to matrixed organizations and team effectiveness. Finally, the concept of team effectiveness within a matrixed structure implies the achievement of more through the use of less individuals since teams are able to be formed by existing employees that are experts within their specific field of work (McPhail, 2016). This concept was related to the specific problem as the findings found that it is team effectiveness that is a determining factor in whether or not the matrixed organization achieves its strategic goals and objectives.

Discussion of Theories

The two theories that were applied to this research study included the contingency theory of leadership and the transformational leadership theory. The contingency theory of leadership suggest that the effectiveness of a leader is dependent upon the leader's ability to adjust their behavior and leadership style based upon the current leadership situation (Waters, 2013). This

theory related well to the specific problem as the matrixed organizational structure is complex and dynamic, which requires middle management leaders to make leadership adjustments as employee resources are shared across the organization and with different managers.

The transformational leadership theory involves leaders encouraging, inspiring, and motivating their followers in order to produce change, grow their followers, and ensure the success of their organization (Niessen et al., 2017). This theory was related to the specific problem in that it related to how middle management leaders must transform their leadership style and approach in order to lead their employees and teams effectively and efficiently inside a matrixed organizational structure.

Discussion of Actors

As it pertains to this study, the primary actors were the matrixed organization, middle management leader, teams, and the information technology industry. The matrixed organization implements a complex cross-functional environment and structure that utilizes current employee resources that are under one manager and distributes those employee resources throughout the organization in order to form new teams under a different manager where employees report to two managers vice just one manager (Burton et al., 2015; McPhail, 2016). This was related to the specific problem as the matrixed organization is the establishment that has implemented the unique matrixed structure that presents a challenge to middle management leaders. Additionally, middle management leaders are the individuals within the matrixed organization that are responsible for bringing the individuals on matrixed teams together in order to achieve organizational goals and objectives (Duncan, 2019). This was related to the specific problem as the middle management leader is the key player inside the matrixed organization that must lead and manage employees and teams. Furthermore, teams are a vital asset to the success of any

organizations and are a key component in a matrixed organization being able to reach their goals and achieve their overall objectives (Wheelan, 2016). Teams were related to the specific problem as teams inside a matrixed organization consist of employees from different sections and departments which form team structures that are matrixed. Finally, the information technology industry was related to the specific problem as this specific industry area is a primary industry where a matrixed organizational structure is implemented and practiced due to the complexity of the project and operational work that must be accomplished by the organization.

Discussion of Constructs

For this study, the applicable constructs included leadership, teamwork, and organizational performance. The construct of leadership was related to the specific problem due to the fact that middle management leaders must use their leadership to bring teams together, collaborate across different departments, and accomplish the goals and objectives of top organizational leaders (Sudirmen et al., 2019). Additionally, the construct of teamwork was related to the specific problem in that it is a critical component to matrixed organizations achieving their goals and objectives (Wheelan, 2016). Also, it is important to note that the construct of organizational performance was related to the specific problem as the matrixed organization has produced an organizational environment that has proven to be both beneficial and challenging for organizations as it has presented a new way of doing business that organizational leaders, managers, and employees have had to adjust to (Duncan, 2019).

Definition of Terms

In order to provide the reader with greater clarity and an increased understanding of the research topic that is being presented and discussed, it is necessary to define key terminology

that was used throughout this study. For the purpose of this study, the key terms included matrixed organization, middle management leader, and effective teams.

Effective Team

The effective team is a team that is both functional and efficient in achieving their assigned goals and objectives and as a result of their effectiveness benefit the overall organization (Wheelan, 2016).

Matrixed Organization

The matrixed organization is a complex structure that distributes organizational resources, employees, and teams across multiple organizational platforms and operations in order to achieve the organizations strategic goals and objectives (McPhail, 2016).

Middle Management Leader

The middle management leader is the individual within a matrixed organization that is responsible for working with and across different resources and departments in order to successfully oversee the day-to-day operations of the organization, and to ensure that the policies and directives of top leadership are implemented and practiced correctly throughout the organization (Duncan, 2019).

Assumptions, Limitations, Delimitations

It is imperative that a researcher, prior to conducting a research study, identify the assumptions, limitations, and delimitations that exist and how these three items might potentially impact their study. Assumptions are items that are believed to be true without proper proof and that could impact the study by false claims being made (Creswell & Poth, 2018). Limitations are influential items that the researcher cannot control and that could impact the study by limiting the research, methodology, or conclusions of the study (Creswell & Poth, 2018). Finally,

delimitations are limitations set by the researcher that could impact the study by limiting the scope, population, or degree of the study (Theofanidis & Fountouki, 2018). Based upon this information, it is necessary to discuss these three areas as they pertain to the study of middle management leaders and the matrixed organization.

Assumptions

Creswell and Poth (2018) note that all researchers, whether they realize it or not, bring some type of ingrained beliefs and assumptions into their research. This study carried with it two key assumptions. First, there was an assumption that the middle management leader is unable to lead effective teams inside a matrixed organization due to the complexity of the structure (Nagini et al., 2020). To mitigate the risk that this assumption poses to the study, the researcher interviewed middle management leaders that were responsible for leading and managing teams within a matrixed organization. By doing this, the researcher allowed for himself to obtain unbiased and objective feedback and data that countered the assumption.

Secondly, there was an assumption that the matrixed organizational structure is setup in such a way that it presupposes that organizations implementing such a structure will have difficulties with their matrixed teams functioning as one cohesive unit (Sutton & Wigert, 2021). To mitigate the risk that this assumption poses to the study, the researcher purposefully sought to not generalize the matrixed organizational structure. Instead, the researcher sought to counter this assumption by obtaining information on the matrixed organizational structure from middle management leaders that actually work and operate day-to-day within such a structured environment.

Limitations

The limitations of a research study can be defined as weaknesses of the study that are outside of the researcher's control (Theofanidis & Fountouki, 2018). For this study, there were at least two specific limitations. The first limitation was related to the qualitative nature of the study in how it allowed for the researcher to interpret the lived realities of each middle management leader participant. Creswell and Poth (2018) note that qualitative research carries with it the potential risk of subjectivity by the researcher. Therefore, in order to mitigate this risk, the researcher first acknowledged that such biases exist and then sought to interpret the data from a non-bias point of view.

A second limitation existed within how honest and open the participants were as they answered and responded to the questions that were being asked of them. Chandler and Paolacci (2017) note that false responses by research participants can lead to and result in conclusions that are inaccurate or incorrect. To mitigate this risk, the researcher, began all interviews by explaining to participants the importance of responding truthfully to each of the questions that were asked of them and the risk that is imposed to the research if they do not.

Delimitations

Delimitations are defined as self-imposed limitations and boundaries that are set by the researcher themselves (Miles & Scott, 2017). As it pertains to delimitations for this study, the researcher set the self-imposed limitation of only selecting part of a specific population of middle management leaders for this research study. Specifically, the researcher only selected middle management leaders that were leading and managing matrixed teams within a matrixed information technology organization. This delimitation impacted the study by not allowing the

researcher to generalize about other middle management leaders working within other types of industries that utilize and implement a matrixed organizational structure.

Significance of the Study

While a vast and valuable amount of research has been conducted separately on the topics of leading and managing teams, middle managers, and matrixed organizations, there has been very little research conducted on the pivotal role that middle management leaders play in leading and managing effective teams within a matrixed organizational structure. Top leaders are the ones within a matrixed organization that make the policies and directives, while middle management leaders are the ones responsible for bringing teams together and successfully implementing those policies and directives at the ground level. Therefore, in order to better understand the relationships, roles, and challenges of the middle management leader that is responsible for leading and managing matrixed teams within a matrixed organization, it was of the utmost importance to study this area more closely in order to expound upon the current data that exists and to further develop this specific area of study.

Reduction of Gaps in the Literature

Due to the changing landscape in the number of organizational structures transitioning from a traditional hierarchy leadership model to a matrixed organizational structure, there is a need for a such a study in order to further expound upon the research that has already been conducted on leading and managing teams, middle managers, and matrixed organizations by combining these three topic areas and researching the gap that exists regarding the pivotal role that middle managers play within the matrixed organizational process and structure (McPhail, 2016). When the top leadership of an organization decides to operate with a matrixed structure, it becomes the responsibility of the middle management leader to be the leader on the ground that

works across all of the different matrixed and functional areas in order to implement the goals, objectives, and strategic vision of top leadership (Iasbech & Lavarda, 2018). This responsibility can be a challenging and daunting task for middle management leaders as they seek to put the plans of top leaders into successful action across the different internal functional areas and matrixed teams that they are responsible for leading and managing (Duncan, 2019).

Due to such, it was necessary to study and research the middle management leader's role more extensively in order to explore and provide useful and beneficial data related to the significance of middle management leaders as they lead and manage matrixed teams within a matrixed organizational environment. Therefore, the purpose of this specific research study was to explore the pivotal role of middle management leaders as they lead and manage matrixed teams within a matrixed organization in order to fill the current gaps that exists between middle management leaders, matrixed teams, and the matrixed organizational structure. Additionally, exploring this area and these items added to the overall understanding and effective practice of leadership as the gaps being filled by this study provided a connection between middle management leaders, matrixed teams, and the matrixed organization that has not previously been made.

Implications for Biblical Integration

Biblical integration is necessary in order for the Christian researcher to maintain a biblical perspective throughout each phase of the research process as data is collected, evaluated, and presented. In Colossians 3:23 the Apostle Paul instructs his fellow Christians to do everything whole heartily as for the Lord and not for men (English Standard Version, 2002). This instruction from Paul is applicable to conducting research as each phase of the research

process must be conducted by the Christian researcher from a biblical perspective that seeks to please God vice being conducted from a perspective that seeks to please man.

Therefore, the process of conducting research from a biblical perspective that is pleasing to God must be accomplished in such a way as to not harm or exploit others, that is respectful of the individual rights of all participants, and that reports the research data in a manner that is open and honest (Holmes & Lindsay, 2018). This is the process that must be applied and followed by the Christian researcher as it adheres to the biblical teaching found in Mathew 7:12 which instructs Christians to do unto others as they would have others do unto them (ESV, 2002). This also implies that the process of conducting research from a biblical perspective will require the Christian researcher to be like Christ and develop trusting relationships, maintain self-discipline, and be sympathetic towards the condition of others (Merida, 2015). Such biblical perspectives were adhered to and applied by this Christian researcher as he conducted his research on middle management leaders and the matrixed organization.

The specific target group for this research study were middle management leaders working within matrixed organizations that are responsible for leading and managing matrixed teams. Therefore, in conducting research on these individuals and in order to properly fulfill the requirement of conducting research from a biblical perspective, the researcher sought to follow and adhere to the previously discussed biblical integration processes. This implies that the researcher approached his research with a mindset of being intentional so as to not harm or exploit the research participants, conducted his research in a way that was respectful of the individual rights of all participants, reported the research data to others in a manner that was open and honest, and developed trusting relationships with the participants by maintaining self-discipline and being sympathetic towards their conditions and responses.

Benefit and Relationship to Leadership Practice

This research study directly benefitted and related to the leadership practice of leader effectiveness. Leader effectiveness is a key leadership practice that is vital to the performance of individual employees, teams, and organizations. A primary contributor to leadership effectiveness is the leader's ability to positively impact employees and teams to perform their roles, duties, and responsibilities in a way that is beneficial to both the performance and outcome of an organization (Madanchian et al., 2017). Three key areas where leadership effectiveness has the ability to impact the matrixed organization can be found within team growth and organizational goals and objectives being met and achieved. Both of these items can be used to benefit the leadership practice of leader effectiveness and has a direct relationship to the leadership practice of leader effectiveness as it pertains to the middle management leader and the matrixed organization.

Kleine et al. (2019) suggest that leadership effectiveness can be measured by whether or not a team is growing and showing high levels of vitality and learning. Within the matrixed organization, this requires individual employees to come together from different areas and sections within the organization and work successfully together as a collective whole. Wheelan (2016) notes that there is a four-stage process of team growth which includes dependency and inclusion in stage one, counter-dependency and fighting in stage two, trust and structure in stage three, and work and productivity in stage four. It is then through the growth and performance level of teams that leadership effectiveness can be measured as it relates to organizational performance.

Additionally, as it relates to the achievement of goals and objectives, Alanazi et al. (2013) notes that such a measure can be tied to the path-goal theory of leadership which suggest

that the outcomes of employees and teams reaching and achieving set goals and objectives are directly impacted and determined by the effectiveness of the leader. They further indicate that the goals and objectives that individual employees and teams are able to achieve are a direct reflection of a leader's ability to effectively lead their teams, bring team members together, and create clear paths for their employees and teams. Therefore, by studying the middle management leader and the matrixed organization, this research study aided in adding to and helping build upon the role and function of middle management leadership effectiveness.

Review of the Professional and Academic Literature

Leadership Practices

All leaders and managers within any type of organizational structure or environment have duties and obligations that they must fulfill due in part to their position. However, there are specific and unique responsibilities that fall onto the shoulders of middle management leaders that do not fall on the shoulders of other types of leaders and managers within an organization (Sudirman et al., 2019). This means that for the middle management leader the responsibilities that they find assigned to themselves may be various and great depending on the type of organizational environment that they work within. Specifically, individuals that fulfill the role of middle management leader within a matrixed organizational structure have duties, obligations, and responsibilities that require them to know their people, empower their employees and teams, communicate regularly to their employees and teams, and set clear goals for their followers (Li, 2018).

Know Your People. A key responsibility of middle management leaders is to develop their teams and the employees on those teams. In order to properly follow through on this responsibility, middle management leaders must get to know their people and adjust their

leadership style to meet the development needs of their teams and the individuals on the team (Wheelan, 2016). This will require dedication and work by the middle management leader as they must learn the characteristics of the different individuals assigned to their teams and then develop and implement the right approaches as a leader in order to develop their teams and team members in the most impactful and effective way (Chaturvedi et al., 2019). Rhmadani et al. (2020) notes that one way in which the middle manager can approach this responsibility is by taking the time to sit down individually with each team member to better learn about each individual team members strengths, weaknesses, likes, dislikes, and personal growth objectives and goals. By doing this, the middle management leader that is leading and managing teams within a matrixed organizational environment can learn their team members much better and adjust their own individual and team development plans accordingly to best meet the develop the needs of those individuals and teams whom they are responsible for (Chaturvedi et al., 2019).

Empower Employees and Teams. The concept of empowering leadership, which involves leaders sharing power with their followers and giving certain decision-making ownership and responsibilities to their employees and teams, has proven to be extremely beneficial to the personal growth and development of employees and teams as it increases the overall work engagement, self-determination, and motivation amongst employees and teams (Cai et al., 2018). The concept is also beneficial to the leader as it allows for the leader's employees and teams to make certain types of decisions on their own without having to consult with the leader directly on every matter (Cai et al., 2018). In turn, this frees the leader up to deal with higher level items and matters that require the leader's attention.

Additionally, another benefit of empowering leadership is that it provides for greater leader-member exchange. Kim et al. (2018) notes that through the means of empowering

leadership, leaders develop different levels of relationship with each employee or team member based upon the individual's competence, performance, and potential leadership abilities. They further note that this is not to say that the leader favors one team member over another, but instead empowers each employee or team member differently based upon their ability levels. In doing this, the leader not only shares power with their employees and teams but also provides their employees and teams with development and personal growth that will assist each individual in enhancing their own skills as future leaders (Kim et al., 2018).

Communicate. Communication is another key factor that is able to significantly enhance teamwork effectiveness and help benefit the overall organization. At the organizational level, communication between middle management leaders and individuals that are part of a team primarily occurs through the three-primary methods of verbal, non-verbal, and written communication (Mohanty & Mohanty, 2018). Various studies have shown that teamwork effectiveness and efficiency increase significantly when leaders and the individuals on teams communicate with one another on a regular basis through the means of verbal exchanges and information sharing as compared to teams that consist primarily of individuals that rarely communicate or share information with one another (Butchibabu et al., 2016). Additionally, intentional communication by the middle management leader with their team members is a key to the development and establishment of teamwork effectiveness and is accomplished via the means of deliberative communication (Wagener & Abongdia, 2020). Based upon previously conducted studies, the teams that prove to be the most effective, the most efficient, and that benefit organizations the most are those teams that routinely practice and implement deliberative communication amongst and between the different individuals that make up the team (Mohanty & Mohanty, 2018). This implies that implicit and intentional communication coordination must

take place between the middle management leader and team members on a regular and reoccurring basis and even more so when the team has been tasked with a high complex task that they must work on and achieve (Butchibabu et al., 2016). Therefore, the goal of all middle management leaders and teams should be to establish deliberative communication that is both intentional and regular in order to enhance overall teamwork effectiveness.

Additionally, middle management leader engagement with employees and teams through the means of verbal communication is crucial to organizational success (Seymour & Geldenhuys, 2018). Regular and effective communication has been shown to be key to the success of middle management leaders and to the type of inspirational and intellectual impact that they have on their subordinates (Linder & Sperber, 2017). This means that middle management leaders serve as a communication conduit through which information should flow and through which direction and guidance should be provided to their employees and teams (Buick et al., 2018). Furthermore, the communication that takes place between middle management leaders and their subordinates must be frequent and it must have a sense of immediacy when a response or answer is required (Brotheridge et al., 2015). Top leaders within an organization, due to higher level duties and responsibilities, can easily lose connection with their employees which is why the communication responsibilities of middle management leaders are so vital to the organization's success (Heyden et al., 2018). Having middle management leaders allows for top organizational leaders to have a conduit by which they can have their voice, policies, plans, and perspectives communicated and relayed to the organizations employees and teams (Li, 2018). Likewise, the same is true of employees and teams in that they can use the middle management leader as their conduit by which to communicate and relay concerns and questions to top organizational leaders (Li, 2018). Heyden et al. (2017) notes that in doing this, the middle management leader is placed

in a strategic position that requires clarity in how they communicate information to top leadership. They also indicate that this is even more true of the middle management leader working within a matrixed organization as they are the one responsible for communicating to top management and other department leaders on the status of matrixed team members that are currently assigned to them for temporary projects or taskings (Heyden et al., 2017). This can potentially present a challenge for middle management leaders as they must assume this responsibility knowing that they will be required to be the link by which all communication up and down the chain of command must be achieved and accomplished (Pakarinen & Virtanen, 2016).

Set Clear Goals. Setting goals for the teams that they are responsible for and reaching those goals for both their teams and the organization is just one of the many other responsibilities given to middle management leaders. Kim et al. (2017) notes that in order to set goals properly there must be goal setting interaction and conversation that takes place between leaders and followers. They further note that by setting goals in this way, the leader will be able to obtain mutual buy from their employees and teams on the goals that have been set while also enhancing the performance and motivation level of their team members.

Within the matrixed organization, the middle management leader's teams will consist of employees from various different departments and sections within the organization, which means that the different team members will come from departments and sections that have differing goals that they are seeking to achieve (Burton et al., 2019). Middle management leaders have the responsibility to bring these team members together and set common goals for the team that the team as a single unit can agree upon, work towards, and achieve as a collective whole (Burton et al., 2019). Additionally, the middle management leader must also assist their team members and

teams in whatever way they can in order to assist them in reaching the goals that have been set for them (Burton et al., 2019). Therefore, for the middle management leader, this means being actively involved in removing obstacles that could potentially get in the way of their employees and teams being able to accomplish assigned tasks or reaching set goals (Wheelan, 2016).

The Problem

The matrixed organization is an extremely complex structure that operates and functions outside of the traditional hierarchal structure that previously dominated the organizational structural landscape and, instead, seeks to find efficiency by pulling human resources, that are experts in both functional areas and product areas, into a single team element with two lines of supervision (Dunn, 2015; Nagini et al., 2020). The success of the matrixed organizational structure is highly dependent upon middle management leaders and their ability to properly lead and manage the different individuals on their teams that have two different reporting chains and managers (Dunn, 2015; Isabech & Lavarda, 2018). This is both a difficult and complex assignment for middle management leaders as they are ultimately the ones responsible for linking and bringing together the individuals and teams that work under different managers within a matrixed organization in order to carry out and successfully achieve the goals and objectives that have been laid out by the top-level leaders of an organization (Duncan, 2019). Without middle management leaders to do this, top level leaders and management would have to take this responsibility upon themselves, which is not a viable and realistic solution in today's business environment. Therefore, it is the middle management leader that has been tasked with the pivotal role of leading and managing effective teams within the matrixed organizational structure, and to be the leader on the ground that works across all matrixed and functional areas

in order to implement the strategic goals and objectives of top leadership (Iasbech & Lavarda, 2018).

Concepts

Within research, concepts pertain to the abstract ideas and phenomena that are being studied (Creswell & Poth, 2018). The primary concepts relevant to this research study include matrixed organizational structure, employee distribution, middle management role, and team effectiveness. Each of these concepts is vital to the research and directly connected to the specific problem that is being addressed by the study.

The Matrixed Organizational Structure. The matrixed organization is a complex structure that distributes organizational resources and employees across multiple organizational platforms and operations (McPhail, 2016). As previously mentioned, the implementation of the matrixed organization was primarily initiated in the 1970's and 1980's due to the fast paced and ever-growing and changing business demands that organizations were experiencing (Pakarinen & Virtanen, 2016). Prior to this, the primary organizational structure implemented by a majority of organizations was the hierarchal structure, which requires employees to report to a singular manager within a clear and well-defined chain of leadership (McPhail, 2016). In transitioning to the matrixed organizational structure, employees generally have more than one line of reporting managers and work within a cross-functional environment that is very unique and robust as compared to the hierarchal structure (Burton et al., 2015). Due to its complexity and uniqueness, the matrixed organization serves its own unique purpose and also presents its own sets of benefits and challenges to middle management leaders.

Purpose. A key purpose behind the creation and implementation of the matrixed organization was to combine the functional expertise of different employees and groups that

exist within an organization in order to streamline processes and better meet the needs of the organization and their customers (Pakarinen & Virtanen, 2016). In doing this, organizations sought and still seek today to become more efficient and use their employees and teams to their full potential and capability in order to maximize returns and better achieve the overall objectives and goals of the organization (Pakarinen & Virtanen, 2016). However, as with any type of organizational structure, there are both benefits and challenges that exists within the matrixed organizational structure and environment.

Benefits. When led and managed properly, a matrixed organization will deliver the benefits of both efficiency and effectiveness. Efficient in that the structure allows for organizations to achieve more through the use of less individuals since teams are able to be formed by existing employees that are technical experts in their specific area of work (McPhail, 2016). This alleviates the need for organizations to hire additional employees when forming a team, while also avoiding an increase in cost.

Also, effective in that the matrixed structure allows for processes and procedures to be streamlined through the means of middle management leaders coordinating and managing work in an effective manner (McPhail, 2016). In doing business this way, the teams that are formed are more holistic in nature, which allows the individuals on the team to function as a collective entity vice as independent contributors (Burton et al., 2015). As a result, these teams become more effective allowing for them to achieve more and develop into a team that is high performing in all aspects of their work (Wheelan, 2016).

The matrixed structure also provides the benefits of flexibility and personal growth by allowing teams members to work with their colleagues from various different departments within the organization. Through this and by this teams typically experience enhanced problem-solving

capabilities and team members become exposed to different functions within the organization that are outside an employee's core function or job (Burton et al., 2015). Each of which contributes significantly to employee growth and development as they learn and experience new and different functions and ways of thinking through different problems and situations.

Challenges. Due to their complexity, the matrixed organization also faces a number of challenges. One of which is that team members have to report to more than one middle management leader. Typically, this means that employees assigned to a team will report to both their functional middle management leader and their middle management project leader for the project team that they have been assigned to (McPhail, 2016). Having to report to two managers can cause confusion in priorities and responsibilities among employees, and also result in possible conflict between the two managers when it comes to the priority of assignments and responsibilities of individuals assigned to a team.

A second challenge revolves around keeping team members both dedicated and motivated towards the projects that they have been assigned. The individuals that get assigned to a team within a matrixed organization know that their assignment to a particular project team is only temporary, and that eventually they will get assigned to another team for another project or return to their functional department to perform their regular job (McPhail, 2016). This presents a challenge to middle managers as they must find ways to keep the individuals that have been assigned to their teams dedicated and motivated all the way through to project completion.

Employee Distribution. Employee distribution is another key concept that exist within the matrixed organizational structure. Pakarinen and Virtanen (2017) note that organizations operating into today's hectic and fast-paced business environment must deal with a plethora of complex and multifaceted problems that span organizational boundaries. They further indicate

that in order to deal with such problems, the matrixed organization has created and setup cross-functional teams that are composed of various different subject matter experts from different departments and sections within the organization in hopes of improving coordination and integration, provide better response time to demands, and decrease the cycle time for product development. This action involves employee distribution from internal departments and branches to one centralized team that is led and managed by a singular middle management leader that must properly oversee the team and ensure the team functions in a manner that is effective and beneficial to the organization's overall goals and objectives (Pakarinen & Virtanen, 2017).

Middle Management Role. Middle management leaders have unique and challenging roles that are extremely impactful as they must serve as the organizational middleman between top management and employees (Li, 2018). Additionally, add to this, the role of serving as a middle management leader within a matrixed organization and the role becomes even more challenging due to the complexity that the matrixed organizational structure presents in relationship to employees and teams (Nagini et al., 2020). Needless to say, this role can be complex and stressful at times as the middle management leader has to serve as both leader and manager to their subordinates, while also performing as a coordinator, motivator, and innovator with their teams across the different departments and branches with the matrixed organization.

Leader. A primary role that the middle management leader fills is that of leader to their employees and the teams whom they are responsible for. One way in which the middle management leader accomplishes this is by guiding, motivating, and helping those that they lead fulfill and achieve the organizational goals that have been set by top organizational leaders and the goals that they, as the middle management leader, have set themselves for their employees and teams (Sudirman et al., 2019). Within the matrixed organizational structure, this role of

leader is crucial to the success of the matrixed teams that the middle management leader leads due in part to the complexity that exists within this type of organization and the crossing over of lines into different departments and branches that is required in order to complete assigned tasks and achieve set and expected goals of top management (Duncan, 2019). Additionally, the team that is part of the matrixed environment, looks to the leader for the guidance and direction that is needed in order for the matrixed team to come together and function as a single unit within the organization (Duncan, 2019).

Manager. A second role of the middle management leader can be found in the title, which is manager. Middle management leaders in all organizations are expected to manage their employees and teams well in order to achieve organizational objectives (Iasbech & Lavarda, 2018). This implies that the middle management leader must assist and help their teams in managing the different tasks, assignments, and priorities that have been assigned to them (Iasbech & Lavarda, 2018). Within the matrixed organizational structure, the middle management leader must do this even more so as the individuals placed on the matrixed teams that they lead come from different departments and branches from within the organization and may not be adequately prepared to work on a team with individuals from outside their department or branch (Chaturvedi & Pasipanodya, 2019). Specifically, middle management leaders operating within a matrixed organization must manage their teams in a way that brings the group together in a collaborative and unified way that encourages and promotes teamwork between the individuals on the team (Duncan, 2019). This can also be a difficult task for middle management leaders as they will be managing individuals with different work-related backgrounds from different departments and branches that may teach and implement different types of work ethics, policies, and procedures that could possibly contradict the way that the

middle management leader prefers to manage their own teams (Chaturvedi & Pasipanodya, 2019).

Coordinator. A third role that is required of the middle management leader is that of coordinator. As a coordinator, the middle management leader should seek to coordinate the efforts of their teams bringing them in line with the objectives of the organization. The same is true of the middle management leader within the matrixed organizational environment, as they should seek to coordinate the efforts of the different individuals on their teams that come from different departments within the organization (McPhail, 2016). This can potentially be a challenging role as the middle management leader must coordinate with other department and branch managers that have employees working temporarily on the matrixed team that the middle management leader is responsible for leading (Pakarinen & Virtanen, 2016). Therefore, coordination must be made by the middle management leader regarding the schedules and assignments of different team members as the members from other departments may also be required to still work on tasks that have been assigned to them by their department or branch manager (McPhail, 2016). This is why the role of coordinator is so important to the middle management leader when working in a matrixed organization.

Motivator. A fourth role of the middle management leader is motivator. As a motivator, the middle management leader should seek to be both a leader and manager that motivates their team to be better and strive to become high performing in all areas of assigned duties and responsibilities (Wheelan, 2016). Within the matrixed organization, this requires the middle management leader to look for ways to motivate all team members that have been assigned to them regardless of their background or the department or branch that they may happen to come from within the organization. As with other assigned roles, this may also be a challenge for the

middle management leader as they must get to know the individuals on their teams that come from different departments and branches, learn what it is that motivates them to perform their assigned tasks, and motivate them to work together with other team members in a manner that benefits the overall organization (Duncan, 2019). Additionally, the middle management leader must also strive to motivate the team to work as a single cohesive unit, which can be achieved by the middle management leader motivating other department and branch managers to allow their employees to focus primarily on the efforts of the matrixed team vice the extra tasks that may be assigned to them by their own department (Pakarinen & Virtanen, 2016).

Innovator. A fifth and final role of the middle management leader is that of innovator. Middle management leaders are expected to be innovative thinkers that develop innovative activities for their subordinates and teams in order to develop teams and individuals that think outside of the box and that are always looking for new opportunities in the marketplace for their organization (Li, 2018). Many times, middle management leaders will look to other organizations or industries to acquire innovative ideas and techniques that they can use and implement within their own teams and organizations (Sudirman et al., 2019). The middle management leader must then take these learned and observed innovative activities and transfer them over to their own teams in a way that is applicable and beneficial to their team members (Heyden et al., 2018). Additionally, the middle management leader must also encourage and support their employees and teams to be innovative across the entire matrixed organizational structure that the team may find themselves functioning and operating within (Sudirman et al., 2019). This can present a challenge to middle management leaders within a matrixed environment as different team members may have opposing views based upon the influence of their functional managers.

Team Effectiveness. Team effectiveness is another concept that is applicable to the matrixed organization but that is also crucial to any organization that desires to be successful. Grenny et al. (2013) notes that leaders and managers will find it very difficult to succeed in different initiatives, projects, and programs if they do not place a primary focus on team effectiveness. Ultimately, the effectiveness of a team is directly related to both the functionality and efficiency of a team in being able to achieve their assigned goals and objectives and as a result of their effectiveness in benefitting the overall organization (Wheelan, 2016). Further discussion on effective teams and non-effective teams will be presented within the constructs and variables section of this literature review.

Theories

Contingency Theory of Leadership. The contingency theory of leadership was introduced in 1964 by Fiedler. Waters (2013) notes that the main constructs of the theory suggest that the effectiveness of a leader is determined by the leader's ability to properly and effectively adjust their behavior and leadership style to the current leadership situation that they find confronting them. He also indicates that the theory itself consist of the two leadership styles of task-motivated and relationship motivated. Both of which are critical and necessary for leaders to implement and practice as they seek to build meaningful relationships with their followers and develop employees and teams that desire to achieve and accomplish identified and set goals (Abba et al., 2018; Waters, 2013).

Task-Motivated. The first leadership style of task-motivated places an emphasis and focus on leaders being able to get their followers to achieve the goals that have been set and laid out for them. Abba et al. (2018) notes that there is no one way of doing this as the contingency theory is a behavioral oriented theory that requires leaders to determine how to motivate their

employees and teams to achieve their goals based upon the current internal and external environmental factors and variables that they are facing and dealing with. They further indicate that this implies that the leadership style a leader chooses to utilize is contingent upon unforeseen situations or circumstances and, therefore, the leader must be ready to adjust their leadership style as needed.

Relationship Motivated. The second leadership style found within the contingency theory of leadership is relationship motivated which emphasizes and focuses on leaders building relationships with their followers. Popp and Hadwich (2018) notes that through the building of positive leader-follower relationships, leaders are better equipped to influence and gain the followership of their employees and teams in order to achieve and accomplish common goals. Additionally, it is through the building of relationships that leaders are able to develop increased levels of trust with their employees and teams, which has been proven to enhance employee and team effectiveness, productivity, and commitment (Popp & Hadwich, 2018; Waters, 2013).

Theory Strength. A key strength of the contingency theory is that it has allowed for both scholars and practitioners to realize that the current leadership situation that a leader finds themselves in will impact the leader's effectiveness (Waters, 2013). Therefore, to be effective, the leader must adjust their leadership style to the current situation vice utilizing a singular leadership style in all situations (Abba et al., 2018). The primary benefit in this is that it allows for the leader to remain flexible in the leadership style they choose to use until they have a clear understanding and realization of the internal and external factors that they are facing.

Theory Weakness. One weakness of the theory lies in the fact that the theory is not able to explain to scholars and practitioners why different types of leaders are more effective in certain situations compared to other situations (Waters, 2013). According to Vidal et al. (2017) a

key item may lie in the fact that not all leaders possess flexibility nor have the ability to adjust their leadership style as internal and external factors arise. They further indicate that this could be influenced by the rational of a leader as determined by their understanding or belief on certain external and internal factors.

Transformational Leadership Theory. The transformational leadership theory was introduced in 1985 by Bass. Niessen et al. (2017) note that the main constructs of the theory consist of leaders encouraging, inspiring, and motivating their followers in order to produce change, grow their followers, and ensure the success of their organization. Specifically, transformational leadership consist of the four sub-categories or dimensions of idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration and is a leadership style that also provides followers with satisfaction, meaning, and support as it relates and pertains to their work duties and responsibilities (Niessen et al., 2017).

Idealized Influence. The subcategory of idealized influence relates to the transformational leader's behavior and how that behavior generates and evokes within their follower's trust, respect, and admiration for the leader (Chebon et al., 2019). Lai et al. (2020) also note that the behavior displayed by the transformational leader, when positive, also develops a desire within their followers to be like their leader and to lead the way that their leader leads. They also indicate that this allows for followers to see and realize their leader's values and in turn will typically adopt the same values as their leader.

Inspirational Motivation. According to Bass (1985), inspirational motivation involves leaders providing their followers with both challenges and meaning for participating and engaging in shared goals (Bycio et al., 1995). It is also through inspirational motivation that leaders are able to motivate their employee and teams and generate greater passion and

commitment within their employees and teams that cause them to go above and beyond what is expected of them in their daily work (Chebon et al., 2019).

Intellectual Stimulation. It is through the means of intellectual stimulation that transformational leaders question assumptions, reframe problems, and take new approaches to old problems and situations (Ogola et al., 2017). Additionally, by promoting this behavior, the transformational leader avoids the status quo and also stimulates new thoughts and possibilities within their followers (Ogola et al., 2017). The key benefit is that this stimulation can produce critical thinking within followers that significantly enhances the performance level of employees and teams (Niessen et al., 2017).

Individualized Consideration. The final sub-category aspect of individualized consideration involves the transformational leader taking time to focus on and give attention to each individual follower (Niessen et al., 2017). Lie et al. (2020) notes that in doing this, the leader will be able to better understand what motivates, stimulates, and inspires each individual team member. They also suggest that this will allow for strong relationships to be built between the leader and follower as the leader gets to know each individual team member on a more personal level.

Theory Strength. A key strength of the theory is that it allows for followers to actually enjoy and thrive in their work instead of just surviving day to day and getting by in order to meet their minimum work requirements (Niessen et al., 2017). This is primarily achieved through the inspirational motivation and idealized influence that the transformation leader displays and practices (Chebon et al., 2019; Lai et al., 2020). Additionally, the theory provides an avenue by which leaders, through their transformational behavior, can assist their followers in achieving goals that they may have thought were never possible.

Theory Weakness. One weakness of the theory, as noted by Niessen et al. (2017), lies in the fact that not all followers are the same when it comes to what inspires and motivates them. Therefore, the leader may find that what inspires and motivates one individual or team may not inspire or motivate a different individual or team. It is because of this, that the transformational leader must also get to know their followers in order to learn what inspires and motivates them Lai et al. (2020).

Constructs & Variables

Leadership. The word leadership encapsulates many things but for the middle management leader two key components of leadership include character and behavior (Sudirmen et al., 2019). The character of a leader defines who a leader is and plays a crucial role in the amount of success that a middle management leader's employees, teams, and overall organization experience (Duncan, 2019). Additionally, it is through both the character and behavior of a leader that their level of effectiveness is determined as they lead and manage their employees and teams (Manning & Curtis, 2019). Therefore, in order to be both successful and effective, middle management leaders must possess genuine character that and excellent behavior that displays authenticity in all areas of their work and dealings with employees and their teams.

Teamwork. Teamwork is a crucial construct for any organization and an abstraction that focusses on and emphasizes the team over each individual member that makes up the team (Rousseau et al., 2006). McEwan et al. (2017) note that teamwork refers to the range of interactive and interdependent behavioral processes of team members that takes team inputs and converts those inputs into real outcomes. They further note that teamwork behaviors include related behaviors that take place before a team task, during the execution of a team task, and

after the team task is completed. Specifically, before the team task, the team defines their mission and sets goals; during the execution of a team task, teamwork elements such as communication, coordination, and cooperation take place; once the task is completed, teamwork involves monitoring task related situations, post-task appraisals, solving problems, and ensuring all goals were met (McEwan et al., 2017). Each of these behavioral teamwork elements must be encouraged by leaders, are inherent to all teams, and a requirement that must be practiced and executed by all teams that desire to be effective (Rousseau et al., 2006).

Organizational Performance. The role that leadership development has in supporting organizational performance is key in the areas of employee and team commitment to the organization and to the overall competitiveness of the organization inside the marketplace (Manning & Curtis, 2019). When leaders set an example and produce an environment for their employees and teams that encourages change and innovation and that also motivates and influences employees and teams to work hard and be their best, leaders develop strong employees, teams, and future leaders that will support and stay committed to the organization (Wheelan, 2016). Heyden et al. (2017) also note that leadership development brings about growth in employee and team commitment to the organization by translating to employees and teams the intentions and goals of top leadership and management in a way that is understood and relevant to their employees and teams. They further suggest that this has the ability to produce greater employee and team support for the organization and increase organizational performance since the goals of the organization have been broken down in a way that become personal to the team and each individual employee.

Additionally, leadership development can also support organizational performance in the marketplace in the form of knowledge sharing. The current day marketplace is extremely

competitive and constantly changing, which requires flexible leaders that share knowledge across the organization with their employees and peers (Cakir & Adiguzel, 2020). As leaders develop into knowledge sharers, they set an example that instills the same type of behavior within their employees and teams, which is ultimately a benefit to the organization's performance in the marketplace and to the competitiveness of the organization.

Matrixed Organization. The matrixed organization is a variable that has the ability to impact the performance of teams. If setup and configured properly and with the right middle management leader, the matrixed organization can produce teams that are both efficient and effective. Burton et al. (2015) note that efficiency can be found in the ability of the matrixed organization to achieve more by using the resources that it already has in place. Additionally, efficiency produces the ability for matrixed organizations to produce teams that consist of individuals that are experts in their specific areas of work which, in turn, affords matrixed organizations the ability to achieve higher levels of performance (Wheelan, 2016). Likewise, effectiveness can be found in the ability of the matrixed organization to streamline the way that they do business through the means of creating and forming matrixed teams that are comprised of experts from various different groups within the organization (McPhail, 2016).

Middle Management Leader and Characteristic Traits. With the complexity that exist within a matrixed organization and the necessity of matrixed organizations possessing teams that are both functional and effective, it is absolutely necessary that matrixed organizations have managers and leaders that can bring individuals on the team together in order to make the organization successful and accomplish its goals and objectives through the matrixed teams that are formed (Duncan, 2019). In today's matrixed organizational environment, this responsibility and duty falls to the middle management leader. As previously mentioned, this can be an

overwhelming responsibility for some leaders and managers, which is why it requires a middle management leader with the right characteristic traits and skills that can fulfill the various different roles and responsibilities while handling and dealing effectively with the challenges that come with such a position within a matrixed environment (Duncan, 2019).

Specifically, the characteristic traits of a middle management leader are crucial to the overall success of a matrixed organization as they are the leader on the ground tasked with the responsibility of bringing different employees within the organization together to form effective teams, while also serving as a conduit by which information can be passed between top management leaders and the employees that the middle management is responsible for leading and managing (Duncan, 2019). Additionally, studies have shown that middle management leaders that display the characteristic traits of being overpowering, overbearing, extremely directive, and extremely demanding do not make good and effective middle management leaders (Li, 2018). This is even more true for the middle management leader that is leading and managing within a matrixed organization as the middle management leader that is working in this type of organizational environment must be empathetic toward others, supportive of others, and possess the personal traits of being honest and flexible while trying to work across different departments within the organization and bring different employees together as a team (Li, 2018).

Empathetic. One key characteristic trait that middle management leaders within a matrixed organization need to possess is that of being empathetic toward their employees and teams. This means that the empathetic middle management leader must invest part of their time and energy into focusing on the emotional needs of their team members by listening to them and taking the time to understand the emotional needs of each individual (Kock et al., 2018). Therefore, middle management leaders must be understanding towards the individuals that have

been placed on their teams as those team members, in being a part of a matrixed organization, will come from different departments and sections that have different leadership and managerial styles that could possibly conflict with the middle management leaders' style of leadership and management (Kock et al., 2018). Additionally, the middle management leader should expect nothing in return for the empathetic and caring actions that they display towards the members of their teams as such actions should be done out of a genuine concern and care for their team members as they seek to ensure the well-being and success of those that have been placed within their purview of responsibility and care (Kock et al., 2018).

Supportive. A second characteristic trait that is valuable for middle management leaders in a matrixed organization to practice and display is that of being supportive of others. By being supportive, middle management leaders assist their employees and teams in becoming more confident and independent in their work and responsibilities (Wheelan, 2016). They also produce an environment where individuals on their teams know that they can go to their middle management leader and have their support in discussing issues, ideas, and their own personal development (Wheelan, 2016). It is by taking an interest in their team members and by taking the time to understand and consider the perspective of their team members, that middle management leaders are able to be more supportive of the individuals or their teams and provide these team members with the support they need and require in order to be successful as an individual and as a unit and valued member of the team (Shih et al., 2019).

Honest. Third, it is absolutely necessary for middle management leaders, regardless of the type of organization or environment that they work in, to possess the personal trait of being an honest individual. The concept of honesty relates directly to the leader's integrity and the leader's ethical behavior in how the leader chooses to execute their leadership influence and

authority over the individuals and teams that they are responsible for leading (Engelbrecht et al., 2015). Specifically, integrity applies to the leader adhering to moral principles in their day-to-day duties and responsibilities as a leader, while ethical behavior is the demonstration of the leader having integrity and following the moral principles that they believe in (Engelbrecht et al., 2015). The middle management leader attribute and characteristic of honesty, as it ties directly to integrity and ethics, is critical to the success of the middle management leader, employees and teams that the manager has direct influence over, and the overall organization as it is one of the key drivers of leader and follower relationships and mutual trust that establishes the middle management leader as an honest and trustworthy leader as characterized by their employees and teams (Engelbrecht et al., 2017).

Flexible. Fourth and finally, matrixed organizations need middle management leaders that also possess the personal trait and ability of being flexible. This is key for middle management leaders as their position places them in a unique role of requiring them to be both a leader and a follower that must be flexible in shifting from one role to the other (Falls & Allen, 2020). This is the case for the middle management leader due to the fact that they lead their subordinates and teams but must also follow the direction and guidance of top organizational leadership (Falls & Allen, 2020). Within the matrixed organizational structure, the middle management leader must also be flexible in their leader and follower roles as they will shift back and forth in leading teams that are comprised of different employees from different departments, while also having to take direction from senior leaders and executives that may not be in their direct chain of command (Heyden et al., 2017). This is not a characteristic trait and quality that every individual possesses, which is why it is so important that the right individual be placed in the middle management leader role within matrixed organizations to serve as both a leader and

manger to those that have been placed in their care, but also a follower to those that they are responsible to report to and to implement the policies and procedures of.

Skills. Skills involve certain strengths and abilities that come naturally to an individual (Burton et al., 2015). Therefore, in addition to characteristic traits, there are also certain and valuable skills that the middle management leader within a matrixed organization must possess. These consist of specific skills related to networking, influencing, and communicating; each of which are valuable skills for a middle management leader within a matrixed organization to obtain and possess.

Networking Skills. The first skill of networking involves the middle management leader's ability to work across party lines with other departments, sections, and managers within the organization. A key to networking is collaboration which involves the middle management leader bringing together individuals from different areas across the organization to work together as one team in order to achieve a common goal (Zandberg & Morales, 2019). To accomplish this, the middle management leader must possess the skill of being able to network with different individuals within the organization which involves developing working relationships with different groups and managers to accomplish the overall mission and goals of upper management and the organization as a whole (Zandberg & Morales, 2019). Within the matrixed environment, this skill is critical for middle management leaders to have as without it there is not much that will be accomplished due to the complexity of the matrixed organizational structure and the need for all parties to work together in order to complete tasks and accomplish goals (Iasbech & Lavarda, 2018).

Influencing Skills. The second skill of influencing involves the middle management leader's ability to affect change and to get individuals to do what needs to get done. In order to

achieve these two items, middle management leaders should utilize the tactics of rational persuasion and inspirational appeals. In implementing the influencing tactic of rational persuasion, middle management leaders use a soft tactics approach vice a hard approach using both logical arguments and factual evidence to influence the individuals and teams that they manage and lead (Chaturvedi et al., 2019). They may also use the same type of tactics when seeking to influence individuals within upper management that they report to (Chaturvedi et al., 2019). Additionally, by implementing the second tactic of inspirational appeals, the middle management leader attempts to paint a picture to the individuals and teams that they lead of what the end result will be or what the outcome will look like once they achieve or reach a certain goal (Chaturvedi et al., 2019). By applying the influence of inspirational appeals, the middle management leader can encourage and motivate their matrixed teams to work hard and become more committed to completing the different tasks that they have been assigned, which will ultimately assist their employees and teams in achieving the goals that they have set out to accomplish (Chaturvedi et al., 2019).

Communication Skills. The third skill of communicating involves the middle management leader's ability to clearly pass information to others in a way that is understood by all and easily receivable (Wheelan, 2016). Middle management leaders hold a position within their organization that falls within a middle area between upper management leaders and the employees on the ground that do the day-to-day work (Sudirman et al., 2019). In order to perform their duties properly, middle management leaders must be able to communicate clearly, effectively, and regularly to both upper management and the employees and teams that they lead and manage (Sudirman et al., 2019). This is even more true for middle management leaders operating within a matrixed organization as the middle management leader in this type of

environment will have multiple communication channels spread out across multiple different departments, sections, teams, and employees by which communication must be clear, effective, and occur regularly between all parties (Iasbech & Lavarda, 2018).

Teams. A team consist of a group of individuals that come from different backgrounds, have their own personality traits, and characteristics. Organizations rely heavily upon the critical component of teams and teamwork in order to accomplish tasks and reach goals. However, the majority of teams, especially when first formed, are not naturally functional and effective. In fact, it is most certain that all teams at some point will experience some type of conflict, which has the potential to create and lead to a team that is either functional or dysfunctional depending upon how conflict is handled by both the leader and team members (Wachsmuth et al., 2018). Additionally, it is important to note that not all team conflict is negative and often times conflict between team members can be used to strengthen the team and transform the team into a high-performance team that functions extremely well together (Pipas, 2020). Therefore, whether a team develops into a functional and effective team or a dysfunctional and non-effective team is dependent upon how team conflict is handled and addressed.

Effective Teams. Task conflict, a popular type of conflict that arises within a majority of teams, is healthy for teams and pertains to disagreements between team members regarding what the goals, priorities, and interest of the team should be (Humphrey et al., 2017). This type of conflict promotes healthy and positive conflict resolution where team members clearly communicate their opinions and views, collaborate together in order to ensure the team's success, and cooperate with those on the team that behave competitively (Wheelan, 2016). Ultimately, task conflict is beneficial to teams and assist in the development of teams that are highly effective.

Additionally, functional team conflict has also been shown to help produce effective teams by facilitating interpersonal relationships between team members, contributing to personal development of individuals on the team, and increasing overall team performance (Wachsmuth et al., 2018). Specifically, functional team conflict can occur due to disagreements that take place regarding team goals and roles (Wheelan, 2016). One key benefit of functional team conflict is that it encourages team members to sit down together to collaborate, discuss, and define together what the goals of the team should be and what the role of each team member should be until there is a general consensus amongst team members (Wheelan, 2016). As a result of such task and functional conflict, teams continue to grow and get better through the conflict that they experience, tend to function at a much higher level, produce higher quality products, and are much more effective overall (Wheelan, 2016).

Non-Effective Teams. Relationship conflict, also known as people conflict, is a type of conflict that destroys teams, is negative in nature, and relates to the incompatibility that exists between certain team members (Humphrey et al., 2017). This type of conflict relates specifically to non-effective dysfunctional teams where team members choose to not participate in positive types of conflict resolution. As a result, this produces team relationships where different individuals on the team do not get along or chose to not get along and as a result team members end up taking sides vice working through conflict and resolving the issue in a healthy and positive manner (Humphrey et al., 2017).

Also of note, dysfunctional team conflict can also lead to unpleasant negative behavior that divides team members and prevents team members from working together (Wachsmuth et al., 2018). Within such types of teams, conflict it typically handled and dealt with by both the leader and team members in an ineffective manner that promotes further division, tension, and

conflict between individuals on the team (Wheelan, 2016). Furthermore, when there is conflict within dysfunctional teams, the members of the team do not communicate with each other as they should which, contributes to a lack of understanding, a lack of trust in one another, and in a team that is completely dysfunctional and non-effective in their process, procedures, assignments, and tasks (Wheelan, 2016). In order to avoid such dysfunction and non-effectiveness, it is absolutely necessary that matrixed organizations look for and acquire middle management leaders that can develop and produce teams within the organization that both are functional and effective.

Information Technology Industry. The information technology industry is constantly changing and producing newer and faster technologies that can enhance the performance of businesses. As new technologies are developed for use, organizations desire to implement these new technologies in order to update their dated IT equipment and systems. Ramasamy (2015) notes that this requires an official project to take place by a team that consist of subject matter experts from various different departments and sections within the organization. He also specifies that within a number of matrixed information technology organizations this takes place as a weak functional matrix team, which means that a middle management project leader is assigned to oversee the project and the project team while a number of the team members are still controlled by their functional department manager. Here in lies the challenge and struggle that the middle management leader is confronted with in leading and managing teams that are effective within the matrixed organizational environment.

Related Studies

The Matrixed Organization and Employee Engagement. Bazigos and Harter (2016) note the following related study concerning the matrixed organization and employee

engagement. In a 2015 Gallup survey of 4,000 workers in the United States, it was found that 84% of the respondents worked within some type of matrixed organizational environment. Of that 84%, it was discovered that the majority of respondents, around 70%, were either not engaged or actively disengaged from their work. Some key findings indicated that a majority of matrixed employees do not fully know what is expected of them at work, they lack clarity from leadership in what their responsibilities are and in what is expected of them, they work on multiple different teams, and report to multiple different managers. Additionally, two positive findings of all respondents were that their organizations, leaders, and coworkers all supported and promoted collaboration, and that the majority of all respondents received some type of recognition or praise during their past seven days of work. The findings of this study support the notion that matrixed organizations are complex and middle management leaders have a challenging role in ensuring employees and teams are engaged, know what is expected of them, and are given clarity in what their responsibilities are.

The Middle Manager's Role and Influence in Organizations. Rezvani (2016), in a related study on the role and influence of middle managers, reviewed 60 peer-reviewed journal articles written between 1975 and 2015 in order to identify the key roles of middle managers and the influence that they have on the organization. The study found that middle managers have the five essential and primary roles of decision-making, leadership, communication along with cooperation, strategic, and administrative. The study further found that these five roles are able to be broken down into specific influencing actions that the middle management leader has with their employees, teams, top organization leadership, and within the overall organization. These findings are consistent with the literature as they support the various unique and challenging roles that middle management leaders possess within an organization.

Empowering Leadership Behavior on Employee and Team Performance. Kim et al. (2018) in their study analyzed 55 independent samples to determine the impact of empowering leadership behavior on employee and team performance. Their study identified the five key areas of evaluation of leader, motivation and resources, emotions, attitudes, and performance that empowering leadership has on employees and teams. Specifically, they found a direct correlation between empowering leadership and positive responses from the 55 participants as it pertained to the five key areas and negative responses to the five key areas from the 55 participants as it pertained to leaders that did not practice empowering leadership with their employees and teams. The results of this study support the information discussed within the literature as it relates to the cruciality of middle management leaders playing a vital role in employee and team effectiveness within the organizational structure.

Anticipated Themes

Team effectiveness. Every manager and organization desires to have teams that are effective. However, teamwork effectiveness does not naturally occur on its own and instead requires dedication, work, and commitment from both team members and middle management leaders (O'Neill & Salas, 2018). As evidenced through the information that has been provided throughout this literature review, key factors such as communication, motivation, innovation, management, and training all have a significant role in enhancing teamwork effectiveness and in developing team effectiveness. There are also challenges that can hinder and negatively impact teamwork effectiveness such as conflict and job demand. Each of these positive and negative factors have some sort of impact on team effectiveness that can either benefit or hurt teams and the members that make up those teams. Middle management leaders and organizations must do their part to better their teams through the means of the positive factors previously mentioned

and also do what they can to prevent the negative factors from developing a stronghold within the teams that they are responsible for leading and managing (O'Neill & Salas, 2018).

Leadership challenges. Facing challenges is a common part of being a leader or manager, but for the middle management leader leading and managing within a matrixed organization presents its own unique set of external and internal challenges (McPhail, 2016). This should not come as a surprise to the middle manager as part of their job involves resolving conflict and working through various different situations that arise within their matrixed environment (Burton et al., 2015). It is how middle management leaders deal with and approach these challenges in the matrixed environment that sets them apart as unique from other managers that operate within a more traditional hierarchical organizational structure (Burton et al., 2015).

External Challenges. External challenges for the middle management leader operating within a matrixed organization may include competing requirements from outside sources, remote resources, or outside environmental conditions. Competing requirements from outside sources can come from customers due to projects that the middle management leader is working on with their team (Iasbech & Lavarda, 2018). Demands for the completion of projects and balancing priorities of different projects all present potential challenges for the middle management leader. Additionally, remote resources that are part of the middle management leader's matrixed team can present a challenge due to different time zones or areas of the country or world that individuals may be located in (Pakarinen & Virtanen, 2016). Also, environmental conditions may play a part in project timelines and resources that may be out of the middle management leader's control (Pakarinen & Virtanen, 2016). Each of these external challenges must be taken into careful consideration by the middle management leader and be confronted in

a way that helps the matrixed organization achieve the goals and objectives that have been laid out for the team.

Internal Challenges. Internal challenges faced by the middle management leader in the matrixed organization may include competing with priorities of other managers in the organization, miscommunication between team members, or challenges from team members. Challenges related to competing priorities will always exist for the middle management leader in the matrixed organization as their team members will typically have a functional manager that they must also report to (McPhail, 2016). Middle management leaders must be willing to adjust priorities and compromise as needed. Additionally, miscommunication between team members is very common in the matrixed environment as team members coming from different departments within the organization may have different ways of communicating and understanding things (Pakarinen & Virtanen, 2016). Therefore, the middle management leader, in this matrixed environment, must get all team members to communicate regularly and clearly (Pakarinen & Virtanen, 2016). Another internal challenge can come from team members challenging the middle management leader. Such challenges are beneficial to team growth and to the team evolving into a high-performance team (Wheelan, 2016). This requires that the middle management leader adjust their style of leadership and management as they face this internal challenge within the matrixed environment in order to let team members move into greater levels of leadership and responsibility (Wheelan, 2016). Each internal challenge is unique and requires the middle management leader to be constantly adjusting their approach and style as internal challenges dictate.

Discovered Themes

Based upon the research that was conducted, the researcher discovered seven predominant themes that emerged from the data. The seven themes included the following:

- Theme One: Competing priorities among top level leaders, middle management leaders, and team members
- Theme Two: Lack of true authority at the middle management leader level
- Theme Three: Disconnect between top level leaders and matrixed teams
- Theme Four: Middle management leaders must be involved in the day-to-day work
- Theme Five: Middle management leaders must possess key skills to effectively lead and manage matrixed teams
- Theme Six: Middle management leaders must possess certain characteristic traits to effectively lead and manage matrixed teams
- Theme Seven: Globalization of the information technology industry

All seven of the discovered themes directly related to the researcher's four primary research questions. Additionally, the researcher utilized these seven themes to focus on the middle management leader and their ability to lead and manage effective teams inside of an information technology matrixed organization. Overall, the findings and themes discovered contained multiple data points that aligned with the research framework and the literature review material.

Summary of the Literature Review

As seen through the information that was presented and discussed, the role of the middle management leader is unique and challenging and even more so when the middle management leader is placed within a matrixed organizational structure. This is why the middle management leader, in order to properly lead and manage within a matrixed environment, must have certain personal characteristic traits that set them apart from other types of leaders and managers. They

must also be willing take on multiple different roles in order to lead their teams effectively and efficiently while also communicating closely with top management and leadership within the organization. Additionally, the responsibilities of the middle management leader are extensive as they must carefully navigate the waters of the matrixed environment to ensure that their team members are taken care of, top management and leadership is receiving what they need, and that all customer needs and requirements are being met. As expected, with this position there also comes many different challenges that the middle management leader must lead and manage their team and organization through in order to be successful, ensure the success of their teams, and the success of their overall organization.

Summary of Section One

Within section one, the foundational material for this study was presented through the means of the background information, problem statement, purpose statement, research questions, nature of the study, framework, and literature review. The middle management leader within a matrixed organization has a very important, challenging, and complex role that they are responsible for fulfilling. The matrixed organizational structure itself is complex and the structure of the organization presents both benefits and challenges to middle management leaders that lead and manage within them. Producing and creating teams that are both efficient and effective is absolutely necessary within this type of organizational structure, and the middle management leader plays a vital role in developing and forming such teams inside the matrixed organizational environment. Additionally, it was through the assumptions, limitations, and delimitations presented and discussed that the researcher was able to identify the boundaries for the study and focus on how the conceptual framework aligns with the chosen topic of study.

In section two, the focus is placed on the research and the research process. Section two begins by reiterating the purpose statement for why this study should be conducted. The focus is then placed on the areas of the researcher's role, the chosen methodology, the participants, data collection methods, and the chosen methods of triangulation.

Section 2: The Project

Section two provides a synopsis of how the researcher conducted and completed the research study process. The section begins by re-emphasizing the purpose statement and identifying the role and actions of the researcher. The researcher then presents the methodology to be used for the project and specifically details why a flexible and single case study design are appropriate for this study while also presenting the appropriateness of the chosen methods for triangulation. Specific details are also discussed regarding how data was collected, organized, and analyzed. Additionally, information is presented and discussed that focuses on the population and sampling along with the reliability and validity of the data and research.

Purpose Statement

The purpose of this qualitative research study was to explore the pivotal role of middle management leaders in leading and managing matrixed teams within a matrixed organizational structure. As Duncan (2019) noted, it is the top-level leaders that create the strategic objectives, policies, and directives for an organization, but it is middle management leaders that are responsible for bringing employees and teams together to achieve those strategic objectives and to ensure organizational policies and directives are followed. Therefore, due to the changing landscape in the number of organizational structures that have transitioned and that are transitioning from a traditional hierarchy leadership model to a matrixed organizational structure, there is a need to study more closely the middle management leader and their role within the

matrixed organizational environment. While a considerable and valuable amount of research has been conducted separately on the topics of middle management leaders, the leading and managing of teams, and on matrixed organizations, there has been very little research conducted on the pivotal and challenging role that middle management leaders play in leading and managing matrixed teams within a matrixed organizational structure. This study sought to explore and research the gap that currently exists within this specific area.

Role of the Researcher

Creswell and Poth (2018) note that the role of the researcher in qualitative research is to collect, evaluate, and present data in order build a complex and holistic picture of the phenomenon that is being studied. Therefore, the primary data collection instrument in qualitative research is the researcher themselves as the researcher is the one solely responsible for conducting all interviews, the collecting and evaluating all data, and interacting with all research participants (Xu & Storr, 2012). For the purpose of this research study, the researcher served as the primary instrument and took the actions of identifying self-biases, identifying research participants, conducting interviews with participants, and evaluating all collected data in order to conduct the study.

According to Robson and McCartan (2016), within qualitative research there exist a greater potential for the researcher to display biases due to a close relationship existing between the researcher, respondents, and the setting. They further note that the researcher, in order to eliminate or lessen the potential for such biases, must be aware of their own potential biases as it pertains to their topic of study. Due to such, the researcher practiced and applied bracketing which required the researcher to put aside his own beliefs and what he already knows about the subject that is being studied (Chan et al., 2013). Additionally, the researcher took the action of

identifying self-biases in order to avoid potential bracketing and in order to conduct the study in a meaningful way that was free of personal biases. Specifically, the researcher has worked in both the public and private sector leading and managing matrixed teams as a middle management leader for the past 24 years. Past experiences of the researcher had the potential to present biases within the researcher towards the data that was obtained through interviews and observations. Due to such, the researcher's actions included maintaining a personal awareness of his own past middle management leadership experiences, dealings, and practices with matrixed teams and deliberately separating those past items from the current data and information that was obtained from middle management leaders.

Additionally, the researcher took the action of identifying research participants via the means of purposeful sampling. Campbell et al. (2020) note that purposeful sampling allows for the researcher to better match the sample of participants to the specific objectives of the research thus enhancing the trustworthiness of the data that is collected and the results that are discovered. For this study, the researcher performed the action of selecting only middle management leaders that were responsible for leading and managing teams within a matrixed organization that specializes in information technology services and projects.

Also, the researcher took the action of conducting interviews with participants. Busetto et al. (2020) note that the benefits of conducting interviews within qualitative research is that it allows for the researcher to gain valuable insights into the experiences, opinions, and behaviors of the individual that is being interviewed. They further note that it also allows for greater conversation and interaction between the interviewer and interviewee while also providing for other unexpected topics to emerge. For this study, the researcher was responsible for fulfilling the role of "interviewer" and performed the action of interviewing all participants.

Finally, the researcher took the action of evaluating and analyzing all of the collected data. To fulfill this role and action, the researcher utilized triangulation which allows for the use of multiple different methods and data sources in order to develop a comprehensive understanding of the topic being studied (Creswell & Poth, 2018). The researcher took this data, coded the data, identified common themes, and compared the data in preparation for presenting the final results and findings.

As evidenced through the information presented, the researcher was responsible for fulfilling the key roles and actions of identifying self-biases, identifying research participants, conducting interviews with participants, and evaluating all collected data in order to conduct the study. These roles and actions could be avoided by the researcher and were critical to the research and data for this study being accurately collected, analyzed, and presented. Therefore, the researcher took all appropriate actions to ensure the data was presented in a non-bias format, that the correct participants were identified while concealing participant names, that interviews were conducted properly, and that all data obtained was analyzed and evaluated through the proper means of qualitative analysis.

Research Methodology

The chosen and selected methodology for a qualitative research study is best decided based upon what type of information the researcher desires to gather and whom they desire to obtain the information from (Robson & McCartan, 2016). For this research study, the researcher chose to utilize a flexible design using qualitative methods with a single case study design to conduct the study and to investigate the research questions that were previously presented in section one. Specifically, the researcher sought to understand and investigate middle management leaders as they lead and manage matrixed teams within a matrixed organization.

Appropriateness of a Flexible Design

A flexible design provides the researcher with a means by which they can adapt and adjust to the research as the research evolves (Robson & McCartan, 2016). Such a design is most appropriate within qualitative research as it allows for flexibility in the research process as the researcher gathers greater amounts of information and data from the various different data sources (Patton, 2015). Therefore, for the purpose of this qualitative research study, a flexible design was the most appropriate design as it provided the researcher with the flexibility to adapt and adjust his research approach as the data evolved through the collection means of one-on-one interviews, observations, and data analysis as it relates to middle management leaders leading and managing matrixed teams within a matrixed organization.

Appropriateness of a Single Case Study

The use of a single case study design allows for the researcher to develop a greater and more in depth understanding of a case as it pertains to a real-life context or setting (Creswell & Poth, 2018). Specifically, Robson and McCartan (2016) state that, “In case study, the case is the situation, individual, group, organization or whatever it is that we are interested in” (p. 150). The single case design is appropriate within qualitative research and in conjunction with a flexible design as it allows for the researcher to focus on one single issue or concern and obtain data on that one single issue or concern through the means of multiple data sources (Creswell & Poth, 2018). Therefore, for the purpose of this study, a single case study was most appropriate as it allowed for the researcher to focus on the topic of middle management leaders leading and managing matrixed teams within a matrixed organization while utilizing the single case of one information technology organization.

Appropriateness of the Chosen Methods for Triangulation

The triangulation of data sources is a valuable tool that can both enhance the researcher's findings while also confirming the validity of those findings (Creswell & Poth, 2018; Yin, 2014). Natow (2019) notes that the process of triangulation itself involves the use of multiple methodological practices in order to paint a full picture of the item or phenomenon that is being studied. Specifically, data sources such as interviews, observations, and document analysis are some of the most valuable and useful tools for conducting a qualitative flexible design research study (Creswell & Poth, 2018; Merriam, 2009).

Therefore, for the purpose of this study, the researcher utilized data triangulation to improve the validity of his findings. Specifically, the researcher utilized interviews, observations, and document analysis to better understand the data that was obtained and to triangulate various themes. This also allowed for the researcher to present a more in-depth and accurate final analysis of the findings.

Summary of Research Methodology

To best study and investigate the role of middle management leaders in leading and managing matrixed teams within a matrixed organization, the researcher determined that the use of a flexible design using a qualitative research methodology was most appropriate. Specifically, a single case study design will be used to best explore the chosen topic and to provide answers to the posed research questions. Therefore, it was through this specific research methodology that the researcher was able to make the final determination that a flexible design using qualitative methods with a single case design was the most appropriate to support this study.

Participants

The individual participants who were eligible to be included within this study were middle management leaders that were responsible for leading and managing matrixed teams

within an information technology based matrixed organization. Specifically, to be selected as a participant, middle management leaders must have met the following criteria. First and foremost, the middle management leaders that were selected must have been responsible for leading and managing matrixed teams within an information technology based matrixed organization. Second, the middle management leaders that were selected must also have been in their role for a minimum of one year. Third and finally, the middle management leaders selected must have been leading and managing matrixed teams that consist of at least five or more team members.

As previously noted within the purpose statement, the purpose of this qualitative research study is to explore the pivotal role of middle management leaders in leading and managing matrixed teams within a matrixed organizational structure. Therefore, due to the purpose of this study, the middle management leader that was leading and managing matrixed teams within a matrixed organization was the best choice to serve as a participant for this specific study. Ramasamy (2015) points out that many information technology organizations have adopted the matrix organization concept due to the convenience of being able to outsource parts of projects to different information technology subject matter experts. Therefore, the middle management leader within an information technology based matrixed organization served as the best type of middle management leader participant. Additionally, Rutter (2021) notes that based upon previously conducted research and studies it has been determined that the ideal team size consist of four to eight team members. Furthermore, the middle management leader leading and managing matrixed teams of this size was the most appropriate type of participant.

Population and Sampling

Creswell and Poth (2018) noted that an important step when identifying and selecting a population and sample for a qualitative study is to find the right people and places to study in

order to gather good quality data. They also advise that the researcher select an ample number of participants and establish a good rapport with these individuals. These two facets of population and sampling were implemented by the researcher for this study as it pertains to the population and sampling of middle management leaders within a matrixed organization.

Discussion of Population

The population for a qualitative research study is comprised of the individuals, groups, or organizations that the researcher is seeking to understand, and the individuals, groups, or organizations that the results and findings of the study can be transferred to and generalized about (Casteel & Bridier, 2021). Therefore, for the purpose of this single case study design, the population of eligible participants consisted of middle management leaders that were leading and managing a matrixed team or teams within an information technology based matrixed organization. This specific population can be characteristically described as middle management leaders that were responsible for leading and managing a team or teams that are comprised of individuals from different sections, divisions, or departments within an organization. Furthermore, as a middle management leader within this type of matrixed environment this population must characteristically possessed the ability to bring individual team members together to achieve the goals of the organization.

Additionally, the middle management leader that was leading and managing within this type of environment and organizational structure was the focus of this study due in part to the significant, vital, and challenging role they have in leading and managing teams within organizations that have shifted away from a standard hierarchal structure to a matrixed structure (Pakarinen & Virtanen, 2016). Specifically, this shift has had the greatest impact on middle management leaders as they are the organizational leaders and managers within a matrixed

organization that are responsible for implementing the strategic vision of top organizational leaders, while having to work across the matrixed teams and functional areas that they are personally responsible for leading and managing (Duncan, 2019; Iasbech & Lavarda, 2018). It is because of this, that middle management leaders responsible for leading and managing matrixed teams within an information technology based matrixed organization serve as the best type of population participants for this study.

Discussion of Sampling

Sampling refers to the methods used by the researcher in order to determine who should be included within the study as a participant (Maxwell, 2013). For this single case study design, the researcher utilized purposeful sampling which allowed for the research to choose the best participants based upon their ability to provide information that was most relevant to the study (Creswell & Poth, 2018). Specifically, purposive criterion sampling was practiced as this form of purposeful sampling involved choosing participants for the study that most closely align with the criteria that was laid out by the researcher for the study (Moser & Korstjens, 2018).

Additionally, Vasileiou (2018) notes that sample size refers to the number of participants that have been chosen for the study by the researcher. He further notes that this typically tends to be a smaller number in qualitative research in order to support a more in-depth analysis of the information and data that is provided by each participant. Specifically, Creswell (1998) suggest a sample size of 20 to 30 participants to be adequate for case study research. Additionally, the required criteria for this Doctor of Strategic Leadership Research Project requires a sample size within the range of 15 to 30 participants. Based upon these criteria, the researcher utilized purposive criterion sampling to select 15 participants for this proposed qualitative research study.

Furthermore, access to the sample was gained by obtaining permission from the identified information technology matrixed organization via the means of the doctoral research project permission request letter and organizational permission response approval letter. Once these items were received, the researcher then identified the middle management leader participants within the selected information technology matrixed organization that best fit the participant criteria. Specifically, the researcher ended up selecting 15 middle management leaders.

Summary of Population and Sampling

Based upon the following population and sampling discussions, this qualitative research study utilized a single case study design that consisted of a population of 15 middle management leader that were chosen through the means of purposive criterion sampling. By selecting 15 participants, the researcher was able to adequately study the participants and provide an in-depth analysis of the participants as it pertains to the middle management leader and the matrixed organization. Additionally, by utilizing purposive criterion sampling the researcher was able to select the 15 participants that best aligned with the stated criteria for this study, and that were also able to provide the most relevant information as it pertains to the topic of study.

Data Collection and Organization

Robson and McCartan (2016) note that a key part of real-world research involves the process of collecting data. They further note that the collection data process involves utilizing different methods of data collection for investigation and utilizing a systematic approach for collecting, organizing, and analyzing the data that is collected. Additionally, within qualitative research, it is typically the researcher that serves as the primary data collection instrument and that also is responsible for performing all of the aforementioned activities (Patton, 2015).

Therefore, based upon these guidelines and criteria, this section clearly delineates and defines the researcher's data collection and data organization plan as it pertained to the collection of data for this study.

Data Collection Plan

When conducting a qualitative research study, it is imperative that the researcher collect data that is relevant to the topic of study and produce a plan for how the data will be collected (Robson & McCartan, 2016). For this study, the researcher collected relevant and meaningful data on the topic of middle management leaders as they lead and manage matrixed teams within an information technology matrixed organization. To collect such data, the researcher utilized multiple data collection methods. Robson and McCartan (2016) suggest that the use of more than one data collection method helps to enhance the rigor and validity of a research study.

Additionally, Creswell and Poth (2018) noted that researchers utilizing a case study research design should utilize multiple forms and sources of data in order to develop an in-depth understanding of the topic they are studying. Therefore, the researcher collected data for his research through the three different methods of one-on-one interviews, observations, and document analysis. Collecting data via the means of these three methods was beneficial to the study as it helped to mitigate any potential biases that may exist within any one single source of information (Creswell & Poth, 2018; Yin, 2014). Furthermore, this was an appropriate plan for this study as the utilization of these three methods allowed for the researcher to gather a vast variety of data on the topic of study from three different and valid sources, while also being able to compile and make comparisons of the data in a non-bias manner that reflected the true findings of the data that was collected.

Instruments

An instrument is a tool used in qualitative investigation to collect, measure, and analyze the research data (Salkind, 2010). Trigueros et al. (2017) note that there are several different instruments that the researcher can choose to utilize for a qualitative research study. These include interviews, surveys, questionnaires, observations, and archived documents or records. The researcher must select and determine for themselves which instruments are best for their study depending upon the data they desire to collect (Creswell & Poth, 2018). It was determined by the researcher that data could best be collected for this study by utilizing the instruments of an interview guide, observation form, and archived data.

Interview Guide. Creswell and Poth (2018) note that an interview guide is a valuable tool that can assist a researcher in organizing their thoughts. Additionally, Kvale and Brinkmann (2009) indicated that the purpose of an interview guide is to provide the researcher with a consistent data collection method while conducting interviews. This researcher utilized an interview guide, which can be found in Appendix A, for this study to address and answer his research questions. The three-interview guide sub-questions under RQ1 addresses the RQ1 question of what differences exists between middle management leaders and top-level leaders in a matrixed organization. The three-interview guide sub-questions under RQ2 addresses the RQ2 question of how the matrixed organizational structure impacts the ability of middle management leaders to effectively lead their matrixed teams. The three-interview guide sub-questions under RQ3 addresses the RQ3 question of team effectiveness within a matrixed organization. Finally, the two-interview guide sub-questions under RQ4 addresses the RQ4 question of the information technology industry and the cultural elements that cause it to be matrixed.

RQ1: In what ways do middle management leaders within a matrixed organization differ from top level organizational leaders?

- How is a middle management leader different from a top-level leader within a matrixed organization?
- What type of skills and traits must a middle management leader within a matrixed organization possess?
- What type of responsibilities does a middle management leader within a matrixed organization have?

RQ2: How does the matrixed organizational structure impact the ability of middle management leaders to lead effectively?

- What matrixed organizational factors contribute to the inability of middle management leaders to lead their teams effectively?
- What matrixed organizational factors contribute to the ability of middle management leaders to lead their teams effectively?
- What matrixed organizational factors impact you personally as a middle management leader as you lead and manage your matrixed teams?

RQ3: In what ways does a matrixed organizational structure inhibit team effectiveness?

- How do ineffective teams impact a matrixed organization in achieving its goals and strategic objectives?
- How can middle management leaders produce effective teams within a matrixed organization?
- How has the effectiveness of your teams been impacted by the matrixed organizational structure?

RQ4: What cultural elements are present in the information technology (IT) industry that make it challenging for middle management leaders to lead effectively inside of a matrixed organization?

- What specific elements of the information technology industry cause an organization to be matrixed?
- Which elements of the information technology industry do you as a middle management leader within an information technology matrixed organization find the most challenging as you lead your teams?

Observation Form. Morgan et al. (2016) note that the use of observations in case study research provides the ability to reach beyond other research case study methods that require and rely upon self-reporting. They also suggest that the use of an observation form can assist the researcher in listing what they want to observe and in properly documenting what they observe. Therefore, this researcher utilized the observation form located in Appendix B to guide and document the observation portion of his data collection for this study.

Archived Data. Archived records and documents provide researchers with another means by which they can collect data (Creswell & Poth, 2018). Additionally, archival data can assist the researcher in triangulating the data that is collected (Yin, 2014). The researcher utilized archival data such as middle management leader notes, end of week reports, official email correspondence to matrixed teams, and team project documents, from the single case study participant, to assist in triangulating the data and findings for the study and to also address and answer the stated research questions for this study.

Data Organization Plan

Robson and McCartan (2016) note that the amount of data collected throughout a qualitative research study can become overwhelming and, therefore, the data must be properly maintained and organized. They suggest that data organization is best achieved through items such as document sheets, session summary sheets, and memoing. Additionally, Creswell and Poth (2018) and Yin (2014) suggest that data can be organized by themes, topic areas, or subject and that all data can be maintained and organized via the means of electronic data storage and software programs. Based upon these recommendations, this researcher chose to utilize themes, memoing, audio recordings, and electronic data storage to organize the data that was collected for this study.

Themes. Organizing data into themes requires the researcher to identify common topics, patterns, or subjects that are mentioned during interviews, observed during observations, and identified while reviewing various documentation (Robson & McCartan, 2016). This researcher utilized the use of themes to organize data into primary and secondary themes. This form of data organization was appropriate for this study as it allowed for the whole of the data that was collected to be broken down into subdivided themes that could be thoroughly analyzed.

Memoing. Creswell and Poth (2018) state that, “Memos are short phrases, ideas, or key concepts that occur to the reader” (p. 188). Specifically, memos can include notes from interviews, observations, and documents that have been reviewed (Patton, 2015). For this study, the researcher utilized memoing during interviews and observations to synthesize the data that was collected. Additionally, the process of memoing was appropriate for this study as much of the data that was collected for this study was obtained through interviews and observations.

Audio Recordings. Audio recordings are typically used by the researcher to record interviews and provide a convenient means by which the researcher can transcribe verbatim the

data that is collected (Rudestam & Newton, 2015). Additionally, there are available software programs such as *Rev.com* and *Transcribe* that allow for the transcribing of recorded audio to text. By incorporating this data organization process, the researcher had the ability to go back and re-listen to the interviews and transcribe the recorded audio interviews into a text format that could better assist the researcher with data analysis.

Electronic Data Storage. According to Creswell and Poth (2018) the use of an electronic data storage system allows for easy retrieval of data and is a useful tool for storing and organizing collected data. Through the means of a computer, the researcher was able to electronically store and file all types of collected data by saving audio files, text documents, and pictures of handwritten memos and notes to the data storage system. This data organization process was appropriate for this study as it provided the researcher with the ability to store a large amount of data electronically that could be easily retrieved and quickly accessed.

Summary of Data Collection and Organization

As discussed, a large amount of data will be collected throughout the course of this qualitative study. Therefore, in order to properly collect the data, the researcher utilized the instruments of an interview guide, observation form, and archived data. The researcher also organized the data through the means of themes, memoing, audio recordings, and electronic data storage. Through the use of these data collection and organizational methods the researcher was well equipped to properly handle and manage the large of amount of data that was accumulated throughout this study.

Data Analysis

Within qualitative research the researcher is the primary instrument that performs the analysis of all data that is collected (Creswell and Poth, 2018). Robson and McCartan (2016)

note that data analysis within a qualitative study involves processes such as coding and triangulation in order to identify major themes, categories, and issues that emerge from the collected data. Therefore, as it pertains to this study, the researcher was the one to manage and conduct all data analysis for this study and was also the one that utilizes the processes of coding and triangulation to perform his analysis of the data.

Emergent Themes

When conducting qualitative research, the researcher will inevitably collect and gather more data than is needed or that can be utilized for their study. It is, therefore, important that the researcher thoroughly examine all the data that is collected in order to identify the data that is relevant and important to the study (Creswell, 2014). The researcher can then look for and focus on emergent themes that arise from the data that has been identified as relevant and important (Creswell, 2014). A key step in achieving this is by the researcher identifying emergent themes and patterns as they analyze and review the transcripts and notes that were taken during interviews (Creswell, 2016; Maxwell, 2013). Therefore, for the purpose of this study, the researcher thoroughly reviewed and analyzed the interview transcripts and notes and utilized memoing and journaling throughout the data examination process to identify emergent themes and patterns that presented themselves from within the relevant and important data that was collected.

Qualitative Analysis

The primary means of qualitative data analysis for this study took place through coding. The process of coding within a flexible single case study design benefits the researcher by providing the researcher with a means by which the large amount of data that is collected can be grouped, categorized, and linked together (Robson & McCartan, 2016). Deterding and Waters (2018) note that coding involves the researcher analyzing all of the interview data that has been

collected and generating numerous and various different codes that are reflective of the data. They also note that when utilizing coding, it is best for the researcher to generate many small codes that are specific to the data collected vice generating large general coding categories.

Coding Themes

Creswell and Poth (2018) note that coding allows the researcher to divide and group the data that is collected into common themes and assign titles to the different identified themes in order to aid in the data analysis process. For the purpose of this research study, data was analyzed and divided into different themes through the means of open coding, axial coding, and selective coding. Robson and McCartan (2016) state that open coding allows for the initial formation of categories, while axial coding allows for the assembling of data in new ways following the process of open coding, and that selective coding allows for major categories or themes to be formed from the initial coding that takes place within the first two coding stages. They also note that by following this type of coding process it will allow for the data that has been collected and coded to be presented in a way that forms a new theory or framework relevant to the issue or problem being studied. Additionally, Creswell and Poth (2018) note that coding is extremely beneficial within case study research as it allows the researcher to discover and identify major themes that can be used to answer the researcher's research questions and explain the findings of the study. Therefore, as it pertains to this case study, the process of coding presented the researcher with a means by which the data collected could be better categorized into major themes to help answer the research questions and provide quality findings relevant to the topic of middle management leaders and their role in leading and managing matrixed teams within a matrixed organization.

Interpretations

Following the process of coding themes, Creswell and Poth (2018) note that the researcher's next step should be to consolidate the multitude of codes that were generated into a handful of pertinent codes that are applicable to the study. Specifically, they defined this process as lean coding. The benefit of this process is that it allows for a manageable amount of key data to be examined and interpreted by the researcher as the researcher seeks to make sense, make inferences, offer explanations, and draw conclusions of their findings and the data that they have collected (Marshall & Rossman, 2006). Therefore, as it pertains to this study, the researcher took the codes that were generated during the data analysis process and grouped them according to their commonality in order to develop specific coding themes. This, in turn, assisted the researcher in the interpretation process of the data as it pertained to the pertinent codes that had been identified.

Analysis for Triangulation

Analysis for triangulation of the interview data was conducted via the means of memoing, categorical aggregation, and naturalistic generalizations. Creswell and Poth (2018) suggest that when conducting interview data analysis of case study research, it is best to organize data into higher level analytical meanings. The researcher used memoing to organize all interview data into higher level analytic meanings and to synthesize the data in order to identify key concepts and ideas. Creswell and Poth (2018) also suggest that when conducting interview data analysis, the researcher should gather a collection of instances and themes from the data looking for issues and relevant meanings. For this study, the researcher implemented categorical aggregation for interview data analysis by analyzing all interview transcriptions and identifying common instances and themes that emerged.

Data Representation

Creswell (1998) notes that data representation is used by the researcher to provide a “packaging” of what was found and discovered during their research study. He further notes that the data is typically presented in text, tabular, or figure form through the use of a comparison table, matrix table, or hierarchical tree diagram to compare and cross-reference discovered themes and categories. Additionally, Yin (2014) suggest that data representation allows the researcher to display the data of each individual participant and discover similarities and differences between the different cases. As it pertains this study, the research utilized data representation to present and compare collected data in a way that allowed for the similarities and differences of the discovered themes and categories to be properly and accurately displayed.

Summary of Data Analysis

Data analysis is an important part of a qualitative research study. Therefore, the researcher conducted his data analysis through the primary means of coding the data that was collected in order to discover themes. The researcher also utilized triangulation data analysis of the interview material to better understand and analyze the interview data that was collected. It is through these data analysis methods that the researcher was properly equipped to thoroughly and accurately analyze all data that was collected for this study.

Reliability and Validity

According to Creswell and Poth (2018), researchers conducting qualitative research should focus primarily on the reliability, validity, and accuracy of their findings. Additionally, Holloway and Brown (2012) note that the items of reliability, validity, and accuracy are achieved by steps and processes that the researcher chooses to implement and utilize for the data collection, handling, and analysis processes. Based upon these criteria's, the researcher focused on ensuring that the data collected, handled, and analyzed for this study presented findings that

were reliable, valid, accurate, and authentic through the steps and processes of reliability, validity, and bracketing.

Reliability

Reliability in qualitative research has to do with the reliability of the researcher's methods, research practices, and findings (Robson & McCartan, 2016). Creswell and Poth (2018) note that the proper use of reliability within the case study method involves the researcher using consistent coding methods, recording interviews, transcribing them into text files, and by providing an audit trail of how the researcher collected and analyzed the data. Additionally, Creswell (2014) indicates that the researcher must thoroughly and accurately examine and interpret the data that they have collected in order to ensure they present findings that are credible and truthful. Based upon these criteria's, the researcher focused on ensuring that the data that was collected, handled, and analyzed for this study presented findings that were credible, reliable, accurate, and authentic by reporting the findings truthfully through the means of maintaining consistency throughout the data analysis process and throughout the interpretation of the data that was collected and the findings that were reported.

Validity

Creswell and Poth (2018) define validation as assessing the accuracy of the findings. Also, Patton (2015) notes that with the case study method of qualitative research there must be some type of validation of the data that is collected. To ensure the validity of this study, the researcher correctly denoted each step that was taken in the data collection and data analysis processes. Additionally, upon completion of the interview portion, the researcher validated the accuracy of the transcripts and the researcher's interpretation of the transcript with the interview participants via the means of member checking.

Data Saturation. Creswell and Poth (2018) note that data saturation exists when the researcher can no longer find any new information to add to the understanding of the study. Specifically, data saturation is achieved when there is no new data, themes, or coding and when the ability to replicate the study has been achieved (Fusch & Ness, 2015). Additionally, the value of data saturation is that it assures the researcher that the collection of any additional data would produce similar results and confirm identified themes and findings (Fusch & Ness, 2015). Therefore, this researcher gathered data from multiple sources through the means of interviews, observations, and document reviews in order to achieve data saturation.

Triangulation. Merriam (2009) noted that data triangulation involves the use of multiple data sources such as interviews, observations, and document reviews to validate the data that is collected. Additionally, Creswell and Poth (2018) assert that the coding of data by the researcher to document themes also exhibits a form of data triangulation. Furthermore, member checking can be utilized as a means of triangulation to aid the researcher in the interpretation and true meaning of the data that is collected (Holloway & Brown, 2012). Such practices were utilized throughout this study by the researcher to ensure the accuracy and validity of the identified themes and findings of the study.

Follow-up Interviews. Creswell and Poth (2018) note that interviews are the primary means by which a researcher gathers and obtains data for a qualitative research study. Subsequently, follow-up interviews allow for the validation of data, new insights to possibly emerge as the researcher and the participant reflect on what was discussed during the original interview, and the clarification of participant answers and responses (Holter et al., 2019). For this study, the researcher utilized the practice of follow-up interviews to validate interview data, discover new insights, and to clarify participant responses as needed.

Bracketing

Patton (2015) notes that bracketing involves the researcher conducting a serious inspection of the phenomenon that is being studied. Specifically, he states that the researcher should take the steps of 1) identifying key phrases and statements within the personal experience that is provided through the participant interview, 2) interpret the meaning of these phrases and statements, 3) obtain the participants interpretation of these phrases and statements, 4) inspect the meanings for features or themes that reoccur from the phenomenon, and 5) provide findings of the phenomenon based upon the essential reoccurring features and themes that are identified. Therefore, to prevent bias and in order to identify key features and themes, the researcher implemented this five-step process of bracketing as he studied and analyzed the data that was collected.

Summary of Reliability and Validity

Both reliability and validity were critical to the formation and accuracy of this study. Therefore, to ensure proper reliability and validity, the researcher practiced consistent coding methods, maintained an audit trail of how data was collected and analyzed, thoroughly denoted all steps taken in the data collection and analysis processes, and implemented member checking. Additionally, the five-step bracketing process was also followed to identify key features and themes. It is through these steps and tools, that the researcher was able to ensure the reliability and validity of this study.

Summary of Section 2

Section two presented and explained the researcher's role, research methodology, the participants, population and sampling, data collection methods, data analysis methods, and the reliability and validity of the research. All items that have been listed and presented within this

section were relevant and helped to build upon the overall purpose of the research study. Additionally, through the methods that were presented and discussed within this section and as the primary instrument for this qualitative study, the researcher was the one personally responsible for gathering, analyzing, and reporting all findings that were obtained and that are presented within section three of this research study. Furthermore, the steps, actions, and criteria that were laid out within section two were critical to the field portion of this study and helped to guide the researcher in the collection and analysis of the data and to ensure the reliability and validity of the data that was collected and that is presented within section three.

Section 3: Application to Professional Practice

Section three begins with an overview of the study and its relevance to middle management leaders and their ability to effectively lead and manage teams within an information technology matrixed organization. Following the overview, the researcher then provides a presentation of the findings and an overview of the various different themes that were discovered. Specifically, each of the discovered themes is presented and discussed in detail as based upon the data that was collected through one-on-one interviews, observations, and correspondence reviews. Lastly, the researcher elaborated on the relationship of the findings as the findings relate to the studies research questions, research framework, anticipated themes, and literature review.

Overview of the Study

The researcher conducted this study to explore and analyze middle management leaders and the challenging and pivotal role they have in leading and managing matrixed teams within an information technology based matrixed organization. The primary means of data collection was achieved through individual one-on one interviews that the researcher conducted with the

participants. In total, the researcher interviewed 15 middle management leaders that currently lead and manage matrixed teams within a large information technology matrixed organization. The length of each interview was between 30 and 50 minutes long. Each participant provided answers to a series of open-ended questions that were asked by the researcher with follow up questions asked by the researcher as needed for clarity purposes. The researcher also utilized a standard interview guide, which can be found in Appendix A, in order to ensure that all participants were asked the same interview questions.

Also of note, the researcher utilized member checking to validate that the information collected from participants during the interviews was correct. The process of member checking was conducted in the following way: the researcher had the recorded interviews transcribed verbatim; the researcher then emailed the transcript to each participant to verify the accuracy of their responses; each participant had a few days to respond back to the researcher to indicate that the transcript was accurate. All 15 participants responded back positively noting that the transcripts were accurate. Once all responses were received back from the 15 participants, the researcher assigned each participant an alphanumeric code to protect their privacy. The researcher then took the interview data and uploaded it into the NVivo software database for coding purposes.

Additionally, the researcher collected data for this study through the means of observations and the review of email and memo correspondence. Specifically, the researcher gathered data through the observation of five individual team meetings that were led and conducted by five of the fifteen middle management leaders that participated in the interviews. For the observation portion, the researcher utilized the observation form found in Appendix B in order to ensure that all the same items were observed during the observations. Also, the

researcher gathered additional data by reviewing and analyzing various different email and memo correspondence that was sent from middle management leader participants to their matrixed team members.

Presentation of the Findings

In conducting this study, the researcher followed Creswell's (2013) six recommended steps for how to properly analyze qualitative data. These steps include (1) preparing the data for analysis by transcribing interviews, scanning material, and cataloging material; (2) reading and reviewing all the data to reflect on its overall meaning; (3) coding the data; (4) developing categories or themes; (5) advancing the manner in which themes will be presented; and (6) interpreting and presenting the search findings (Creswell & Poth, 2013). Specifically, the researcher conducted fifteen interviews, recorded all interviews utilizing the *Rev Voice Recorder* application on his iPhone and sent all of the interview audio recordings to *Rev* for the recordings to be transcribed into 15 separate written / typed documents. Each of the documents was uploaded into NVivo and given a specific alphanumeric code. For example, participant one's document was P1, participant two's document was P2 and so forth all the way through to participant fifteen's document P15. The researcher read through each interview several different times to better reflect on each interview and made notations in the form of memos to document his initial thoughts on possible themes. This led the researcher to begin the coding process through the use of the NVivo software. The researcher chose to manually code the interview data by identifying common words that were categorized into different nodes that the researcher manually created within NVivo. From these codes, the researcher began grouping the common codes into themes. As the researcher continued the analysis process, he grouped the various different themes into main themes.

Additionally, the researcher gathered data through the observation of five individual team meetings that were led and conducted by five of the fifteen middle management leaders that participated in the interviews, and through various middle management leader email and memo correspondence. For the observation portion, the researcher utilized the observation form found in Appendix B. The observation forms and correspondence were analyzed following the same process as the interview data with the researcher manually coding the data by identifying common words, grouping the codes into various themes, and then into main themes.

Overview of Themes Discovered

Through the course of this study and through the collection of data, the researcher was able to obtain a large amount of significant and pertinent information pertaining to middle management leaders and the matrixed organization. All data was gathered through the means of individual one-on-one interviews, observations, and the evaluation and review of middle management leader correspondence. However, the primary means of theme discovery was achieved through the one-on-one interviews that the researcher conducted with the 15 middle management leader participants. The researcher evaluated and compared the themes discovered in this study with the overall research framework. Specifically, the researcher took into consideration all aspects of the research framework to include the theories, concepts, actors, and constructs in order to determine if the themes aligned with these various aspects of the research framework. The researcher also analyzed the discovered themes by evaluating and examining the academic literature that is presented and discussed within the literature review portion of this study. In total, the researcher discovered seven emergent themes from the data that was collected. The seven themes include the following:

- Theme One: Competing priorities among top level leaders, middle management leaders, and team members
- Theme Two: Lack of true authority at the middle management leader level
- Theme Three: Disconnect between top level leaders and matrixed teams
- Theme Four: Middle management leaders must be involved in the day-to-day work
- Theme Five: Middle management leaders must possess key skills to effectively lead and manage matrixed teams
- Theme Six: Middle management leaders must possess certain characteristic traits to effectively lead and manage matrixed teams
- Theme Seven: Globalization of the information technology industry

All seven of the emergent themes directly related to the researcher's four primary research questions. Additionally, the researcher used these seven themes to focus on the middle management leader and their ability to lead and manage effective teams inside of an information technology matrixed organization. Overall, the findings and themes discovered contained multiple data points that aligned with the research framework and the literature review information.

Discussion of Themes

The researcher discovered and identified a number of themes from the data that was collected. As previously noted, a majority of the data was collected through the means of one-on-one interviews with some additional data collected through observations and the review of correspondence. Specifically, the researcher discovered and identified seven main themes within the data that was collected. The seven themes related directly to the researcher's four primary research questions. These themes were used by the researcher to focus on middle management

leaders and their ability to lead and manage matrixed teams within an information technology based matrixed organization.

Theme One: Competing priorities among top level leaders, middle management leaders, and team members. Competing priorities was a common theme mentioned at one point by all 15 interview participants. Due to the silo of different individual groups within the matrixed organization, it is expected that there will be competing priorities between the different groups and the individuals within those groups (Isabech & Lavarda, 2018). P3 has been a middle management leader for more than 20 years and currently leads a matrixed team of seven employees and denoted the following in regard to competing priorities:

Competing priorities are a daily and constant struggle that I face as a middle manager inside a matrixed organization. Top level leaders have their big picture goals and objectives for the organization, middle management leaders have their goals and objectives, and then each individual team member has their own goals and objectives. Each of these goals and objectives equates to a priority which often times contradicts another group or individual's priorities, which leads to competing priorities between groups and individuals.

P15 has been a middle management leader for seven years and leads a matrixed team of ten individuals and also voiced a struggle with competing priorities. P15 denoted:

As a middle management leader of a matrixed team, I struggle to lead my team effectively because of the competing priorities that are set by my direct management and my own agenda for my team. A lot of times, these priorities are different since my manager is not involved in the day-to-day operations of my team and doesn't always

understand what the priorities should be since they are not dealing with the customer and team on a daily basis like I am.

P2 was the most junior middle management leader, not by age but by number of years in the position, that was interviewed, having only been a middle management leader for two years responsible for leading a team of six personnel. P2 denoted:

I would say the failure of the various different groups to effectively work together due to competing and conflicting priorities impacts me greatly. Each group has its own agenda to push and will toe the party line to achieve those personal agenda items. This is often to the detriment of customers across the enterprise. There have been numerous times where political posturing, all due to different priorities from different groups, has delayed critical projects assigned to my team or impacted daily operations in a negative way.

Additionally, the theme of competing priorities was also evidenced and validated through the observations conducted by the researcher and through the review and examination of middle management correspondence to their matrixed team members. Throughout several of the observations, the researcher witnessed technical team members, such as engineers, stating to the middle management leader, that was in charge of the matrixed team, that they had a number of other projects to tend to and other related work that had been assigned to them by their functional manager. Thus, making the point to the middle management leader that they had other priorities that conflicted and that would conflict in the future with the project related priorities that the middle management leader was attempting to layout and distribute to their matrixed team members.

Furthermore, through the review and examination of seven different middle management leader email correspondence to their matrixed team members, it was noted by the research that

each of the seven middle management leaders at some point in the emails asked different team members what other priority work had been assigned to them by their functional manager.

Within the emails, the middle management leaders listed out what their priorities were for the current project and asked the team members to provide a response of where these priorities could fit into their current schedule. The emails were also sent by the middle management leader to the team member's functional managers for awareness and to seek the functional managers assistance in helping the employees prioritize their current work and the new work that had just been assigned to them.

Theme Two: Lack of true authority at the middle management leader level. The lack of true authority at the middle management level was a reoccurring theme noted by a majority of the participants. McPhail (2016) noted that within the matrixed organization, employees assigned to a team will report to both their functional middle management leader and to the middle manager that is leading the matrixed project team that they have been assigned to. He further noted that this presents a challenge as the true authority tends to lie with the functional manager and not the middle manager that is leading the matrixed team. P9 has been a middle management leader for eight years and leads a team of seven members. P9 denoted:

The issues I run into the most with the matrixed organizations model is when issues are identified that are outside my scope. I cannot fix them and instead I have to escalate such issues to my leadership in order to get the other organization or group involved to fix the issue.

P14 has been in a middle management leader role for ten years and currently leads a team that consist of eight personnel. P14 denoted:

One of the most difficult obstacles I face is not having the true authority or power to direct and lead my matrixed team. I don't mean that in a controlling way but in a way that lacks true ownership of the team. In the matrixed organization, my team is made up of individuals from various different functional areas such as engineering and security and while these individuals are on my team, they still report and answer to their functional manager who more or less dictates the bulk of their daily schedules.

Additionally, P5 has worked as a middle management leader for 16 years and has led teams of various sizes throughout his career. Presently, he leads a team of eight personnel. P5 voiced similar concerns to that of P9 and P14 but was a bit blunt denoting:

The middle management leader has no absolute or true positional authority and the matrixed personal on the team know that. The reason they know that is because the team's priorities are either set by the customer or by the middle manager's boss. They also know this because the team members know that they can go to their functional manager and complain about what the middle manager of the matrixed team has asked and directed them to do if it is something they do not like or want to do.

Theme Three: Disconnect between top level leaders and matrixed teams. A third theme noted by the researcher was a disconnect that appears to exist within the matrixed organization between top level leaders and the matrixed teams. Based upon the findings, it was found that disconnects take place internally within the matrixed organization between top level leaders and matrixed teams and that these disconnects can impact the organization meeting customer expectations and requirements. P1 has been a middle management leader for 12 years and leads a team of 15 personnel. As it pertains to disconnects, P1 denoted:

Disconnects tend to happen when top level leaders have conversations and make decisions with the customer without consulting with the middle manager and the middle manager's matrixed team. Not involving the middle manager in these conversations and decisions is bad and can lead to problems because a lot of times top level leaders will promise things that are unrealistic or that require an unnecessary amount of additional work.

P6 has been a middle management leader for 11 years and leads a team of five personnel and noted something very similar to P1. P6 denoted:

Top level leaders are responsible for the big picture of the organization and don't always understand what it takes at the ground level to make things happen. Too many times, I have seen top leaders make policies or decisions and tell middle managers to execute and enforce those policies without actually understanding that the middle manager leading a matrixed team does not have full authority over the team to enforce the policies.

P7 indicated that there is a disconnect between top leaders and the matrixed team that tends to revolve around middle managers. P7 has been a middle management leader for 17 years and leads a team of 22 personnel. P7 denoted:

There are misunderstandings that occur within the matrixed organization between different groups and levels of leadership due to multiple different managers passing different information up to leadership. As a manager leading a matrixed team, I pass info up the chain to my leadership but the functional manager, of the engineer that is on my team, also passes info up to the same leadership. These messages can be mixed and told differently by each person leading to possible misunderstandings.

Theme Four: Middle management leaders must be involved in the day-to-day work.

The general consensus of all middle management leaders that were interviewed was that they are the leaders on the ground responsible for the day-to-day work and operations that take place.

Duncan (2019) made note that top organizational leaders rely heavily upon middle management leaders to oversee the day-to-day operations of the organization and to ensure that organizational policies and directives are implemented and practiced throughout the organization by their teams. This involvement in the day-to-day work is a key part of the middle management leader's role. P4 has been a middle management leader for nine years and leads a matrixed team of approximately 30 personnel which is the largest matrixed team of all the participants that were interviewed. P4 denoted:

Middle management leaders must have a lower-level focus if they want to truly understand the small and detailed nuances involved in their matrixed team's day-to-day duties, responsibilities, and requirements. By having this focus, the middle manager is better equipped and more able to help guide their employees and to help them learn and resolve issues better.

P13 has been a middle management leader for 8 years and leads a team of 6 personnel. P13 provided the following personal example by stating:

My matrixed team and I will not be successful if I am not involved and connected to the day-to-day work of my team. For example, there was an instance where one of my team members, an engineer, had a side conversation with a customer and decided to conduct a technical change on their network during working hours. I was not involved in this conversation or decision. The change happened and was unsuccessful causing the

customer's network to be down for about three hours during normal working hours. This type of thing is why I must be included and involved in the daily operations of my teams. P10 has been a middle management leader for six years and leads a team of eight personnel. P10 spoke specifically to the fact that she must be involved in the day to day so that she can keep her customer and leadership informed. P10 denoted:

There are a lot of moving pieces in the projects that my matrixed team is responsible for, and I have to be involved in those things. If I am not involved, then I will not know what is going on and will not be able to properly keep my customer and leadership informed.

Additionally, the researcher noted through the email correspondence that was reviewed and through the observation of meetings that middle management leaders regularly asked their matrixed team members for status updates for the items they were working on. At times, the middle manager would dig deeper if they required more information or needed a deeper understanding. All of which alludes to the fact that middle management leaders must be involved in the day-to-day work of their team.

Theme Five: Middle management leaders must possess key skills to effectively lead and manage matrixed teams. The theme of possessing specific and certain key skills was a major item and point recognized by all interview participants. While the list of skills was lengthy, the top three skills that were identified and mentioned by the majority of the 15 participants included communication, the ability to influence, and conflict resolution. Each of these skills directly impacts a middle management leaders' ability to effectively lead and manage their matrixed team.

Communication. Communication was by far the number one skill identified by all interview participants. Through the means of communication, managers are able to significantly

enhance teamwork effectiveness and benefit the overall organization (Mohanty & Mohanty, 2018; Wagener & Abongdia, 2020). As it relates to the skill of communication, P1 denoted:

Communication is key to my success and my team's success as a middle management leader. It has to take place daily, it has to be clear, it has to be direct, and it has to flow up and down the chain of command from top leadership to me as the manager and then from me to my team and vice versa. Without good communication, things can get messy and be misunderstood or misinterpreted. Also, team members need to feel like they can communicate with me as their manager.

P2 denoted:

The ability to communicate both verbally and in written form to a large group of people is a critical skill to possess as a middle management leader. A large portion of my job entails of public speaking to VIP customers as well as various teams. If I'm unable to communicate clearly to the customer in a meeting confidence may be lost in my ability as manager. Likewise, if my guidance is not clear or uncertain to my team, they may question my capacity to lead as well.

P3 denoted:

There are a lot of skills that a middle management leader should possess, but I would say that communication is the big one. The middle manager must be able to communicate effectively at all levels of the organization not just at the team level. I have to be able to communicate to my team the work and priorities that need to be completed, and they have to be able to communicate to me the work they have accomplished and if there are any showstoppers to getting the work done. Additionally, I have to be able to communicate to my top leaders what the team on the ground is doing and communicate it

in a way that is clear so they can better relate to any issues or problems that the team may be experiencing.

Additionally, P10 denoted:

I must communicate in a way that proactively conveys meaningful and actionable guidance to my subordinates and craft thoughtful requests for information from top executive leaders and the customer on behalf of my team members. The way in which I communicate will determine the level of clarity and understanding that my team has about the work that needs to be done and for my top leadership to better relate to the team and the work they are doing.

The researcher also noted that communication was a key element during the observation of team meetings and a key element of the correspondence that was reviewed. The middle management leaders that were observed by the researcher were constantly communicating to their team members through the verbal means of communication. Additionally, the same leaders utilized email and memo correspondence to communicate with their teams when they could not communicate with them verbally.

Ability to Influence. The ability to influence was a second key ability that was noted. The findings identified that the ability to influence revolved primarily around the middle management leader's ability to influence their matrixed team members. P12 has been a middle management leader for twelve years and leads a team of eight personnel. P12 denoted:

A key skill for me as a middle management leader is having the ability to influence. Not the ability to command but to influence. With the matrixed team, I am limited in my level of authority over certain team members since they report directly to a functional manager. In order to get project tasks completed on time for the customer, I have to be able to

positively influence those types of team members to accomplish the required task on time instead of being harsh and forceful with them.

P6: denoted:

Where success is dependent on shared resources, middle management must be closely integrated with peers in each of the functional areas. To that end, the middle manager is better able to influence matrixed team members and functional area managers to accomplish what the middle manager needs done.

Furthermore, having the ability to influence was also recognized by the researcher throughout his observations of the team meetings that were led by middle management leaders. Instances were noted during the meetings where the manager needed a certain team member to take on and complete a certain project task. Instead of demanding the team member to take on the task, the majority of managers used their influencing and persuasion skills to get the team member to agree to take on the task.

Conflict Resolution. The third skill identified was conflict resolution. Teams are made up of different individuals that possess different personalities, beliefs, and ways of doing things. Inevitably this will bring and cause conflict at times within teams. As it pertains to conflict P9 denoted:

Conflict is inevitable when it comes to the matrixed team. There is going to be conflict because the team consist of different individuals from different departments. As a middle manager responsible for leading and managing a matrixed team, I must be able to deal with conflict effectively. If I can't deal with conflict in an effective way, my team is going to fail, and I am also going to fail as their leader and manager. This has rippling

effects because it will also cause the overall organization to fail in achieving its goals and objectives.

Additionally, P14 indicated that middle management leaders must be able to resolve conflict when it comes to dealing with team members and differing priorities. P14 denoted:

The middle manager must absolutely have conflict resolution skills. Different team members are going to have different priorities since they report to a functional manager. A difference in priorities can and will cause conflict. When this occurs, the middle manager must have the necessary skills required to resolve the conflict that exist and work out the conflicting priorities in a thoughtful and meaningful way with the team members and their functional manager.

Conflict was witnessed first-hand by the researcher during a few of his observations. Specifically, conflict between team members that did not agree on how to accomplish a particular task was most noted. In all instances, the middle management leader allowed for the two team members to work the issue out themselves and would step in as needed to mediate between the two individuals in order assist them in finding a resolution. This conflict resolution skill was critical for the manager to have in order to bring the team members together in finding a resolution to their conflict.

Theme Six: Middle management leaders must possess certain characteristic traits to effectively lead and manage matrixed teams. Similar to but different than the previous theme of key skills is key characteristic traits. While skills are able to be developed, characteristic traits are focused on an individual's personality and who an individual is as a person. Based upon the literature, middle management leaders must be empathetic toward others, must be able to work well with others, and possess the personal traits of being trustworthy,

honest, and flexible as they work to bring different employees together as a team (Li, 2018).

Overall, the findings of the study supported such aspects with the top three characteristic traits mentioned by the participants being trustworthiness, calm demeanor, and the ability to get along with others.

Trustworthiness. Trust was mentioned by several of the participants and tended to focus primarily on the fact that middle management leaders must build trust with their matrixed team members and their leadership. P10 denoted:

Trust is extremely important to middle management. My team members have to know that they can trust me, and I have to know that I can trust them. If we don't trust one another than we are going to have a very difficult time working together and getting things done. The same is true of me and my leadership. Basically, trust works both ways and it takes everyone trusting one another for trust to exist.

P11 has been a middle management leader for nine years and leads a team of seven personnel.

Similar to P10, P11 also focused on trust with team members and leadership. P11 denoted:

To effectively lead and manage a matrixed team, a middle manager must build trust. They have to build trust with their team, with their customer, and with their top executive leadership. Trust doesn't happen overnight; it takes time, and it is something that every team member must have in their manager.

Calm Demeanor. Calm demeanor was a second popular characteristic trait mentioned amongst the participants. P5, in referring to middle management leaders denoted:

They must have a calm demeanor that reflects an attitude of thankfulness and gratefulness for the support that the different team members provide to achieve the

objectives and end goals that have been established. You can't have a demanding and harsh demeanor and then expect the members on your team to want to do things for you.

Also, P1 denoted:

You have to have the ability to stay calm when it comes to dealing with some of the members on your matrixed team. The way in which some of the team members work and operate can be frustrating because they come from different functional groups that have a different way of doing things and getting things done.

The concept of having a calm demeanor was also witnessed personally by the research during two of the observations that were conducted. Specifically, the researcher experienced team members challenging the middle management leader on how certain tasks should be accomplished. Instead of getting upset or argumentative, the middle manager chose to explain in a calming manner to the individuals why these specific items had to be done this certain way. The way in which this was handled provided the team members with a clear understanding and helped to ease the tension of the team members.

Ability to Get Along with Others. The ability to get along with others was a characteristic trait noted by a number of participants. It was also keenly noted during the researcher's observation of various different team meetings. P8 has been a middle management leader for seven years and leads a team of five personnel. As it pertains to getting along with others, P8 denoted:

You need to be able to get along with others which involves the ability to know how to read people and relate to people. You can't just say that something needs to get done.

That does not work. You have to build a relationship with the different members on your team and as you do that you will learn how to relate better to each individual person. This

helps to create a bond between myself and my team members that goes beyond the work that needs to be accomplished.

P7 denoted:

The ability to get along with others is necessary as a middle management leader when it comes to leading and managing matrixed teams. One way this can be achieved it through team building. The matrixed team is a mix of folks from all different departments and sections and each person has their own style and personality. By regularly implementing and encouraging team building exercises, the middle manager helps build relationships with their team members and is able to learn each individual person and relate to each person in a more meaningful way.

Through his observations, the researcher noted how several middle management leaders looked for ways to connect personally with their team members. In doing this, the manager and team members appeared to feel more comfortable with one another and as a result seemed to get along better during their meetings and discussions.

Theme Seven: Globalization of the information technology industry. Globalization of the information technology industry was a theme well noted by a number of the participants. With advances in technology and the fast-paced business world, the information technology industry has become significantly globalized promoting a matrixed culture (Ramasamy, 2015; Pakarinen & Virtanen, 2016). The focus on globalization, by the participants, was primarily centered around the way in which matrixed teams are composed. P10 denoted:

Globalization is changing the traditional business structure and has trended the IT industry toward a matrixed organizational structure that includes members from various countries with various skill sets. The physical distance between customer locations, call

center helpdesk, IT technicians, and team members is the norm in today's IT industry, which is why today's IT industry is so matrixed.

P1 emphasized how the size of an information technology organization relates directly to globalization by denoting:

With very large IT companies, the organization becomes designed with multiple layers of top-level managers. Decisions hastily happen without the middle manager's input. This equates to an organization having a large number of different departments within the organization, which means different teams for different tasks. One simple project task of activating a phone may take ten different individuals or groups that are spread out across the country and world. The coordination of all these groups, by the middle manager, for one thing to happen takes time due to schedule and time differences of the different groups and team members.

P2 also made an interesting point concerning globalization as it pertained to the makeup of teams. P2 denoted:

My organization has outsourced a number of positions to individuals that are offshore. Meaning not in the United States. This presents a challenge to me as I try to get work done. The knowledge level is not the same, time zones are different, the cultural elements of remote workers in certain countries differs greatly from U.S. workers, and communication can become significantly hindered. All of these things contribute to a matrixed team that struggles to be successful and to get things done in a timely and effective manner.

Additionally, from the observation of team meetings it was noted by the researcher that a number of team members were located remotely across the United States in different time zones,

and in various different countries such as India and the Philippines. During these observations, it was seen by the researcher that the middle management leader was not always able to contact certain remote workers due to time differences. Also, through the email correspondence that was reviewed and analyzed by the researcher there was evidence that miscommunication existed at times between managers and their remote team members that were located overseas. All of which supports the notion that globalization in fact does impact the middle management leader's ability to lead their teams effectively.

Relationship of Findings

The researcher's findings suggested themes related to competing priorities, lack of authority, disconnect between leadership levels, middle management leader skills and characteristics, involvement in day-to-day task, and globalization within the information technology industry. All of the findings and discovered themes were noted by the researcher based upon the input that was provided by each of the individual participants, the researchers observation of matrixed teams, and review of middle management leader correspondence to team members. The findings from this study and the seven themes that were identified and discovered all directly relate to key areas of the research proposal and, specifically, show a clear relationship and connection to the research questions, the research framework, the anticipated themes, and the literature review.

The Research Questions. The researcher developed four researcher questions for this study with the purpose of exploring the pivotal and challenging role that middle management leaders play in leading and managing teams within an information technology based matrixed organizational structure. The findings and identified themes addressed each of the individual research questions and provided key insights into the topic of study. Specifically, each

discovered theme was able to be directly tied to one or more of the research questions and proved valuable in addressing and answering the researchers four research questions.

RQ1: In what ways do middle management leaders within a matrixed organization differ from top level organizational leaders? The findings addressed research question one by noting that there is in fact a distinguishable difference that exist within a matrixed organization between middle management leaders and top-level organizational leaders. This was evidenced within theme one as it was shown that different competing priorities exist between middle management leaders and top-level leaders due in part to the differing responsibilities that each type of manager is responsible for.

The findings of theme three also addressed research question one by noting that there is a disconnect that exist within matrixed organizations between top-level leaders and matrixed teams. Specifically, based upon the findings, the researcher noted that middle management leaders are more connected with the day-to-day dealings and work of the matrixed team due in part to their role of being the manager on the ground. Meanwhile, top-level leaders tend to be more disconnected from matrixed teams due to their higher-level role which often limits the amount of interaction that they have with matrixed teams.

Research question one was also addressed by theme four. The findings of theme four found that middle management leaders must be actively involved in the day-to-day work of their teams. While top level leaders are more focused on the big picture of the organization, the middle management leader must be focused on the day-to-day work that happens at the ground level. The findings strongly supported this by noting the middle manager's involvement in team meetings, interaction with the customer, and direct interactions with team members.

Finally, both theme five and six also addressed research question one. The findings of these two themes found that middle management leaders must possess certain key skills and characteristic traits, that are not necessarily required of top-level leaders, in order to properly lead and manage their matrixed teams. Specifically, the findings found that skills such as communication, ability to influence, and conflict resolution along with the characteristic traits of trustworthiness, calm demeanor, and the ability to get along with others are all needed of middle management leaders as they lead, manage, interact with, and work with matrixed teams. However, top-level leaders do not interact with matrixed teams the same way in which middle management leaders do, therefore, the aforementioned skills and characteristics may not be as much of a requirement for the top-level leader.

RQ2: How does the matrixed organizational structure impact the ability of middle management leaders to lead effectively? The findings addressed research question two through a number of the identified themes. Specifically, theme one indicated that within the matrixed organization there are competing priorities that exist between top-level leaders, middle management leaders, and team members. These competing priorities impact the ability of middle management leaders to lead their matrixed teams effectively and exist due to the matrixed team structure that matrixed organizations have chosen to implement.

Research question two was also addressed by theme two. Theme two identified that there is a lack of true authority at the middle management leader level. The findings suggested that the matrixed organizational structure promotes matrixed teams that are composed of various different resources such as engineers and security individuals that report to both their functional manager and the middle manager that is leading the matrixed team. This dual manager structure

of the matrixed organization impacts the ability of middle management leaders to lead effectively.

The findings of theme three also addressed research question two by discovering that there is a disconnect that exist between top-level leaders and matrixed teams. This disconnect is caused by the matrixed structure which tends to separate top-level leadership from the middle management leadership that is on the ground overseeing the day-to-day work of the matrixed teams. This disconnect that occurs within the matrixed organization structure between the top-level leadership and the middle management leader and their matrixed team can impact the ability of middle management leaders being to lead their teams effectively.

RQ3: In what ways does a matrixed organizational structure inhibit team effectiveness? The findings addressed research question three through themes one, two, three, and seven. The findings of theme one identified that there are competing priorities that exist within the matrixed organization at the top-level leader, middle management leader, and team levels. These competing priorities have the potential to inhibit team effectiveness due to the focus of each group or each individual team member being focused on different and competing priorities.

The findings of theme two also addressed research question three. As previously noted, the findings of theme two found that there is a lack of true authority at the middle management leader level. Middle management leaders within the matrixed organization are responsible for leading and managing matrixed teams that are composed of various different team members that also report to a functional manager. This aspect of the matrixed organizational structure inhibits team effectiveness as the middle management leader that is responsible for leading the matrixed

team is limited in their ability to completely and fully manage their teams schedule when it comes to assigned task, milestone dates that need to be met, and pending customer requirements.

Research question three was also addressed by the findings of theme three. Specifically, the findings of theme three found that there is a disconnect within the matrixed organization between top-level leaders and matrixed teams. This disconnect can lead to miscommunication and misunderstanding between top-level leaders and the middle management leader and their matrixed team. This aspect of the matrixed organizational structure can inhibit team effectiveness as top-level leaders may become disconnected from what steps or actions need to take place in order for certain tasks or requirements to be met by the matrixed team, or the level of effort that is actually required to complete assigned task or requirements. Additionally, per the findings, such disconnects can also lead to top-level leaders making promises or commitments to their customers that the middle management leader and their team cannot fulfill.

Finally, the findings of theme seven addressed research question three as well by noting that the information technology industry has become extremely globalized. The findings indicated that information technology matrixed organizations have globalized themselves by hiring employees that are located in various different time zones and regions across the United States and in other countries around the world. Matrixed teams are then composed of these individuals. This element of a matrixed organizational structure inhibits team effectiveness as middle management leaders must contribute more time in dealing with cultural differences, time zone differences, and overall differences that exist in work ethic.

RQ4: What cultural elements are present in the information technology (IT) industry that make it challenging for middle management leaders to lead effectively inside of a matrixed organization? The findings of theme seven addressed research question four by

discovering that the information technology industry has become globalized. By far, globalization of the information technology industry was the number one recognized cultural element, by the participants, that is present within the information technology industry and that makes it challenging for middle management leaders to lead effectively inside of a matrixed organization. Specifically, the findings found that the information technology matrixed organization has matrixed teams that are composed of team members from various different regions, cultures, and time zones across the United States and across the world. This globalization factor presents a challenge to middle management leaders as it primarily pertains to time differences, cultural differences, and work ethic differences as they seek to effectively lead their matrixed team.

The Research Framework. The research framework for this study was composed of various different elements pertaining to specifically discussed concepts, theories, actors, and constructs. Each element of the framework is unique and relevant to the overall study. Notably, the findings of this study produced seven key themes that are related to each of the elements within the research framework.

Relationship of the Findings to Concepts. The key concept items of the research framework consisted of the matrixed organizational structure, employee distribution, middle management, and team effectiveness. The findings related to the concepts of the research framework as evidenced through all seven identified themes. Specifically, each theme was developed based upon the findings that were discovered through one-on-one interviews, observations, and the review of middle manager correspondence to team members. The findings produced themes that were related to the concepts of the research framework by noting that there are competing priorities that exist within the matrixed organizational structure. That there is a

lack of authority at the middle management leader level within the matrixed organization due to the way in which employees are distributed to teams from different departments within the organization. That there is a disconnect within the matrixed organization that impacts team effectiveness and the middle management leader's ability to lead effectively. Also, the findings found that there are key skills and characteristic traits related to the concept of middle management leaders and their ability to lead and manage matrixed teams effectively within the matrixed organization. Finally, the findings surrounding the globalization of the information technology industry related to the framework work concepts by identifying time, work ethic, and cultural diversity as key findings that impact the matrixed organizational structure, matrixed teams, and the middle management leader's ability to lead teams effectively.

Relationship of the Findings to Theories. The Contingency Theory of Leadership and the Transformational Leadership Theory are the two theories discussed within the research framework. Both theories are focused on leadership and the leader's behavior, style, and ability to motivate others to get things accomplished. The researcher found that the findings as they pertain to the identified themes relate to each of the theories within the research framework. Specifically, the Contingency Theory of Leadership suggest that the effectiveness of a leader is dependent upon the leader's ability to adjust their behavior and leadership style based upon the current leadership situation (Waters, 2013). The findings of themes one through four and theme seven relate to this theory as the findings noted that middle management leaders must adjust their behavior and leadership style in order to work effectively with matrixed team members, functional managers, and top-level leaders. This is due to the fact that middle management leaders face competing priorities, lack true authority at times, and experience disconnects between top-level leaders and themselves and their matrixed teams. Furthermore, the middle

management leader has to be involved in the day-to-day work and deal with the globalization factor that impacts matrixed teams.

Additionally, the Transformational Leadership Theory involves leaders encouraging, inspiring, and motivating their followers in order to produce change, grow their followers, and ensure the success of their organization (Niessen et al., 2017). The findings of themes four through six relate directly to the Transformational Leadership Theory as the findings found that the middle management leader must possess key skills and characteristic traits in order to effectively lead their matrixed teams and ensure the success of their team members. By having the right skills and characteristics, the middle management leader is better equipped to encourage, motivate, and inspire their followers as per the concept of the Transformational Leadership Theory. Additionally, the findings found that middle management leaders must be involved in the day-to-day work of their teams. This relates positively to the Transformational Leadership Theory as this involvement by the middle management leader in the day-to-day work of their team brings about greater involvement and awareness of the middle manager as they grow their followers and ensure the success of their matrixed team and matrixed organization.

Relationship of the Findings to Actors. The noted actors within the research framework were the matrixed organization, middle management leader, teams, and the information technology industry. The findings related to the actors of the research framework as evidenced through all seven themes. The findings indicated that all actors have a purposeful, active, and critical role as it relates to matrixed teams and the matrixed organization. The findings relate directly to the matrixed organizational structure and how that structure defines the role of the middle management leader and the matrixed team. The findings also related to the middle management actor and their role within the matrixed organization as they lead and manage

matrixed teams. Additionally, the findings related to the matrixed team as an actor in that the effectiveness of a matrixed team is determined in part by the matrixed organizational structure and the ability of the middle management leader as it pertains to key skills and characteristics. Further, the findings also related to the information technology industry due in part to the globalization that has occurred within the information technology industry. Each of these actors have a critical role in the research framework and the findings supported a strong relationship between the actors and identified themes.

Relationship of the Findings to Constructs. The key constructs within the research framework were leadership, teamwork, and the information technology industry. As with the other elements of the research framework, the findings related to the constructs of the research framework as evidenced through all seven identified themes. The researcher's findings found that leadership at the top-level and middle management level must deal with competing priorities within the matrixed organization. The findings also related to the construct of leadership and the lack of authority at the middle management leadership level and the disconnect that takes place within the matrixed organization between top-level leaders and middle managers and their matrixed teams. Additionally, the findings related to the construct of teamwork as the matrixed team is the key element within the matrixed organization that the middle management leader is responsible for leading and managing. Furthermore, the findings supporting the concept of globalization and its impact on the matrixed organization and its middle management leaders and matrixed teams related directly to the information technology industry.

Anticipated Themes. The researcher's findings presented a number of themes that related directly to the anticipated themes. The researcher's anticipated themes were focused on the two primary aspects of team effectiveness and leadership challenges as it relates to external

and internal challenges that exist. Each anticipated theme was supported in some way by the findings and was able to be connected to one of the seven identified themes.

Team Effectiveness. The findings related to the anticipated theme of team effectiveness in that the findings supported the fact that there are conflicts that can hinder team effectiveness, key skills and characteristic traits that are needed by middle management leaders in order for their teams to be effective, and involvement of leaders in day-to-day work. Specifically, the findings of theme one showed that competing priorities exist within the matrixed organization and can negatively impact team effectiveness. The findings of theme four demonstrated that middle management leaders must be involved in the day-to-day work of their matrixed teams if they desire to achieve team effectiveness. Furthermore, the findings of themes five and six found that middle management leaders must possess key skills and certain characteristic traits if they desire to lead and manage teams that are effective.

Leadership Challenges. The findings also related to the anticipated theme of leadership challenges that exist both internal and externally. Notably, as it relates to internal leadership challenges, the findings of theme one discovered that competing priorities amongst top-level leaders, middle managers, and matrixed team members present a challenge to middle management leaders. The findings of theme two also related to this anticipated theme by noting that there is a lack of authority at the middle manager level due to the matrixed structure that exist of team members reporting to a functional manager and a middle management leader that is responsible for leading the matrixed team. Additionally, the findings of theme three also related directly to the anticipated theme of internal leadership challenges by discovering that there is a disconnect within matrixed organizations between top-level leaders and the middle management

leader and their matrixed team which can lead to leadership challenges at the middle management leader level.

As it pertains to external leadership challenges, the findings of theme seven related to this anticipated theme by noting that the information technology industry has become globalized. This creates a leadership challenge for middle management leaders as they seek to lead matrixed teams that are spread out across the country and globe. The findings found that middle management leaders must work through the challenges that exist within the areas of time, work ethic, and cultural diversity as they lead and manager their matrixed teams.

The Literature. The literature review portion of this study covered a vast amount of information related to the matrixed organization, matrixed teams, middle management leaders, and the information technology industry. Much of the information discussed within the literature review is similar in nature and aligns with the research findings. However, the researcher did note some areas where the findings differ from the literature review. These similarities and differences are best evidenced through the seven themes that were identified through the findings of the research study.

The findings of theme one found that competing priorities exist within the matrixed organization between top level leaders, middle management leaders, and team members. This relates to the literature as evidenced through different challenges that middle management leaders face. Having to report to two managers can cause confusion in priorities and responsibilities among team members, and also result in possible conflict between managers and team members when it comes to the priority of assignments and responsibilities of individuals assigned to a team (McPhail, 2016). The findings of the study found this to be true as competing

priorities tended to cause conflicts between individuals at all levels within the matrixed organization.

The findings of theme two found that there is a lack of true authority at the middle management level. This relates to the literature as evidence through the employee distribution section of the literature review. Pakarinen and Virtanen (2017) noted that the matrixed organization has created matrixed teams consisting of different team members from different departments that report to two managers. The findings of the study found that this type of matrixed setup gives limited authority to the middle management leader over their matrixed teams due to the fact that team members report to both their functional manager and the middle management leader that is leading the matrixed team.

The findings of theme three found that there is a disconnect between top level leaders and matrixed teams. This relates to the literature as the literature notes that middle management leaders have unique and challenging roles that are extremely impactful as they must serve as the organizational middleman between top management and employees (Li, 2018). This role is crucial as the findings found that the matrixed organizational structure can cause disconnects to occur between top level leaders and the matrixed teams if middle management leaders do not properly do their part to mediate between the two groups and provide fluid information and communication up and down the organizational chain.

The findings of theme four found that middle management leaders must be involved in the day-to-day work of their matrixed teams. This relates to the literature as the literature specifically notes that the middle management leader must assist their team members and teams in whatever way they can in reaching the goals that have been set for their matrixed teams (Burton et al., 2015). Therefore, for the middle management leader, this means being actively

involved in removing obstacles that could potentially get in the way of their employees and teams being able to accomplish assigned tasks or reaching set goals (Wheelan, 2016). This is relevant to the findings as the middle management leader in order to achieve this must be involved in the day-to-day work of their matrixed teams in order to properly understand what obstacles exist and what goals need to be achieved.

The findings of themes five and six found that middle management leaders must possess key skills and characteristic traits to effectively lead and manage matrixed teams. This relates to the literature as both the findings and the literature found that middle management leaders must possess the characteristics of being trustworthy, honest, and flexible and the skills of good communication and the ability to influence. Differences were found in that the research also identified characteristic traits of a calm demeanor and the ability to get along with others while the literature noted additional characteristic traits of empathy and supportiveness.

Finally, the findings of theme seven found that the information technology industry has become extremely globalized. This relates to the literature as the literature noted that within the information technology industry, official projects take place by a team that consist of subject matter experts from various different departments and sections within the matrixed organization (Ramasamy, 2015). The researcher's findings found this to be true but also found the information technology industry to be extremely globalized with matrixed team members being scatter across the country and across the globe. This factor presents a challenge for the middle management leader that is more complex and that goes beyond the simple complexity of matrixed team members coming only from different departments or sections within the matrixed organization.

Summary of Findings

This researcher, based upon the findings, noted seven prominent themes within this study on the middle management leader and their role in leading and managing matrixed teams within an information technology based matrixed organization. Key themes identified included: competing priorities, lack of authority, disconnects, involvement in day-to-day work, key skills, characteristic traits, and globalization of the information technology industry. As evidenced through the information provided, these themes were linked directly to the research questions, research framework, anticipated themes, and the literature.

Additionally, the findings and identified themes also addressed the general problem which pertained to the inability of middle management leaders to lead effectively within a matrixed organizational structure resulting in poor organizational performance. This inability of middle management leaders to lead effectively was addressed through the findings of theme one that noted there are competing priorities that making leading difficult for the middle manager. Also, the findings of theme two addressed this by noting the lack of authority at the middle management leader level due to the dual manager reporting that exist within the matrixed organization. The findings of theme three also addressed the general problem by noting the disconnect that occurs within the matrixed organization between top level leaders and the middle management leader and their matrixed team. The findings of theme four addressed the general problem by noting middle management leaders must be involved in the day-to-day work of their matrixed teams to be effective. A lack of involvement can result in ineffectiveness. The findings of themes five and six also addressed the general problem by noting that middle management leaders must possess key skills and characteristic traits. A failure to possess these key skills and characteristic traits will make it much more difficult for the middle management leader to effectively lead their matrixed teams. Also of note, the findings of theme seven addressed the

general problem as well by noting that the ability of middle management leaders to lead effectively is impacted by the globalization that has occurred with the information technology industry. These findings and associated themes each addressed the general problem and evidence the inability of middle management leaders to lead effectively within a matrixed organizational structure which can lead to and result in poor organizational performance.

The findings and identified themes also addressed the specific problem being studied which is the possible inability of middle management leaders to lead effectively within the information technology (IT) industry where a matrixed organizational structure has been implemented resulting in ineffective teams that do not benefit an organization in achieving its strategic objectives. As discussed within the previous paragraph, the same findings and themes addressed the specific problem. The findings surrounding competing priorities, lack of authority at the middle management leader level, disconnects between top level leaders and middle management leaders and their matrixed teams, day-to-day involvement, key skills and characteristic traits, and the globalization of the information technology industry all addressed the specific problem as each of these findings impact in some way the ability of middle management leaders to lead effectively within an information technology-based matrixed organization.

Also of note, the findings and identified themes addressed the purpose of the research which was to explore the pivotal role of middle management leaders in leading employees and teams within a matrixed organizational structure. All findings and identified themes presented addressed the overall purpose of the research by demonstrating that middle management leaders, while they face a number of challenges and are hindered in some respects as a leader, do in fact have a pivotal role in leading employees and teams within a matrixed organizational structure.

Furthermore, the specific themes make it clear that the role of the middle management leader is crucial to the daily function and operations of a matrixed organization as it pertains to leading their matrixed teams in achieving the organizations goals and objectives.

Finally, the following three key conclusions were drawn by the researcher based upon the findings. The first conclusion drawn is that middle management leaders must constantly deal with items that limit their ability to lead and manage effectively within a matrixed organization. These items include competing priorities, lack of true authority, disconnects between top level leaders and the middle management leader and their matrixed teams, and globalization of the information technology industry. Each of these specific item's impact in some way the middle management leader's ability to lead and manage their matrixed teams effectively.

The second conclusion that was drawn from the findings revolves around the fact that middle management leaders must possess key skills and characteristic traits in order to deal with the plethora of issues and problems that come their way within the matrixed organization. The key skills of communication, ability to influence, and conflict resolution along with the characteristic traits of trustworthiness, calm demeanor, and the ability to get along with others are all crucial to the middle management leader's ability to properly lead and manage their matrixed teams due to the unique structure that exist within the matrixed organization.

The third and final conclusion drawn from the findings focuses on the information technology industry. The findings found that the information technology industry has become extremely matrixed due to the globalization of their employees and teams. Therefore, the conclusion can be drawn that any middle management leader working within an information technology-based organization will have to deal with matrixed teams and an overall organizational structure that is matrixed. This will present a challenge to middle management

leaders as they will have to deal with time zone differences, work ethic differences, and cultural differences that exist within the matrixed teams.

Application to Professional Practice

The data that has been obtained, analyzed, and presented by the researcher may also be applied to general professional practices. The general problem that the researcher addressed within this study is middle management leaders and the pivotal and challenging role they have in leading and managing matrixed teams within an information technology based matrixed organization. Specifically, this section reviews how the results of this study can potentially be applied to middle management leaders as they lead and manage teams within a matrixed organizational structure.

Improving General Leadership Practice

The researcher utilized this section to expound upon how this study's findings can be applied to middle management leaders and their role in a matrixed organization as they lead and manage matrixed teams. The researcher's data and findings supported the following themes: (1) competing priorities, (2) lack of true authority, (3) disconnects, (4) involvement in day-to-day work, (5) key skills, (6) characteristic traits, and (7) globalization. Each individual theme provides a possible starting point for middle management leaders and the matrixed organizations that they work within to improve upon their general leadership practices.

Competing Priorities among Top Level Leaders, Middle Management Leaders, and Team Members. In theme one, the study's participants denoted that competing priorities exist between both themselves, top level leaders and their team members. The study's findings within this theme can improve general leadership practices by developing greater awareness of competing priorities that may potentially exist within a matrixed organizational structure. By

having greater awareness of competing priorities, middle management leaders can better prepare themselves to manage competing priorities at both the matrixed team level and top leader level.

Lack of True Authority at the Middle Management Leader Level. In theme two, the study's participants denoted that there is a lack of true authority at the middle management leader level. The findings found that this exists due to the dual manager reporting that takes place within a matrixed organization. General leadership practices can be improved through the results of this theme's findings by middle management leaders focusing more on the areas where they do have authority and being self-aware and knowledgeable of the areas where they do lack authority. Being cognizant of this will let the middle management leader focus more what they can control and less on what they cannot control.

Disconnect between Top Level Leaders and Matrixed Teams. Within theme three, the study found that there is a disconnect that exist between top level leaders and matrixed teams. This appears to exist due to poor communication flow between top level leaders and the middle management leader and their matrixed team. To effectively improve general leadership practices, middle management leaders should take the results of this theme and identify key areas where they believe disconnects occur and look for solutions that can help eliminate those disconnects. By doing so, the middle management leader could potentially create an environment within the matrixed organization that is much more fluid and connected.

Middle Management Leaders must be Involved in the Day-to-Day Work. Theme four discovered, based upon participant responses, that middle management leaders must be involved in the day-to-day work. The results of the study that are linked to this theme can improve general leadership practices by providing middle management leaders with insight as to how their involvement in the day-to-day work of their matrixed teams is impactful and valuable.

Additionally, it is by this day-to-day involvement that middle management leaders will gain better insight and be able to better lead and manage their matrixed teams as they fulfill their role as the leader on the ground responsible for the day-to-day work and operations that take place within the matrixed organization.

Middle Management Leaders must Possess Key Skills and Characteristic Traits to Effectively Lead and Manage Matrixed Teams. Themes five and six are similar in nature and found that middle management leaders must possess key skills and characteristics traits to effectively lead and manage matrixed teams. The results of the study that are linked to this theme can improve general leadership practices by identifying for middle management leader's key skills, such as communication; the ability to influence; and conflict resolution, that they should seek to grow in and focus on. Additionally, the study will assist middle management leaders in properly understanding what personal characteristic traits are most valuable as it pertains to individuals that are considering working within a matrixed organization as a middle management leader.

Globalization of the Information Technology Industry. In theme seven, the study's participants denoted that the information technology industry has become extremely globalized. Specifically noting that the members of matrixed teams are scattered around the country and world. The study's findings within this theme can improve general leadership practices by preparing middle management leaders for a globalized matrixed team environment when entering into an information technology based matrixed organization. Furthermore, it is also able to provide such leaders with a greater depth of understanding and realization of the globalized information technology industry as it directly pertains to a matrixed organizational structure.

Potential Implementation Strategies

The researcher gathered a large amount of information and data for this study that could be used to develop potential implementation strategies to better assist and guide middle management leaders as they lead and manage matrixed teams within a matrixed organizational structure. Specifically, this researcher has identified the three potential implementation strategies of build relationships, seek out opportunities for personal growth, and develop a training and development program. Middle management leaders should review these potential implementation strategies and determine for themselves the appropriateness of each as it pertains to their current role as a middle management leader inside a matrixed organization.

Build Relationships. The results of the study conveyed that there are competing priorities that exist among top level leaders, middle management leaders, and team members; that there is a lack of true authority at the middle management leader level; a disconnect between top level leaders and matrixed teams; and a necessity for middle management leaders to be involved in the day-to-day work of their matrixed teams. To properly address such items, middle management leaders should implement the strategy of building relationships with top level leaders, team members, functional managers, and their own middle management leader peers. By building relationships, the middle management leader is potentially able to bring together different individuals and groups from across the matrixed organization to work together as one team in order to accomplish set goals and objectives (Zandberg & Morales, 2019). Therefore, middle management leaders should take it upon themselves to determine, based upon their own matrixed environment, where they should focus the most and least amounts of time as it pertains to building relationships. The findings and results of this studies are also able to assist middle management leaders in making this determination as they take into consideration the areas of competing priorities, lack of true authority, disconnects, and involvement in the day-to day work.

Seek Out Opportunities for Personal Growth. The results of this study also supported the value of middle management leaders possessing key skills such as communication, the ability to influence, and conflict resolution; and the specific characteristic traits of trustworthiness, calm demeanor, and the ability to get along with others. In taking these items into consideration, a second potential implementation strategy that middle management leaders should consider is seeking out opportunities for personal growth. By improving upon and sharpening specific skills, middle management leaders can better both themselves and their teams (Duncan, 2019) As a strategy, middle management leaders should conduct self-assessments of themselves as it pertains to their skills and characteristic traits, and also seek input in these two areas from other individuals at the top leader, middle management leader, and team levels. Additionally, middle management leaders should also go a step further and conduct a comparison of the information and input obtained from their own self-assessment, and the input and data that is obtained from top level leaders, their middle management peers, and from their team members. Middle management leaders could then take the information and input that they have acquired and focus on their own personal growth in the areas identified.

Develop a Training and Development Program. Finally, the results of this study supported the fact that middle management leaders are confronted with a plethora of challenges within the matrixed organization as they seek to effectively lead and manage their matrixed teams. Therefore, to assist middle management leaders in confronting these challenges, a third potential implementation strategy would be for matrixed organizations to develop and implement a structured training program for their middle management leaders. Rodriguez and Walters (2017) noted that organizational training and development programs have been proven to increase employee morale, confidence, performance, competencies, and skills. Specifically,

matrixed organizations could use the seven themes that were identified within this study as the foundational basis for their training and development program in order to properly prepare their middle management leaders for the challenges they will face.

Summary of Application to Professional Practice

The results of this study could potentially be used by middle management leaders and matrixed organizations to better assist and guide middle management leaders as they lead and manage matrixed teams within a matrixed organizational structure. Each of the potential implementation strategies discussed provides a means through which middle management leaders and matrixed organizations could take action to address the challenges they face and improve upon their current capabilities and abilities. Additionally, the information that has been provided within this section should also be tailored as required to fit the specific need of each middle management leader and matrixed organization.

Recommendations for Further Study

While the data collected in this study is valuable and pertinent to middle management leaders leading and managing matrixed teams within an information technology based matrixed organization, it also revealed gaps that should be addressed in future research. Specifically, this researcher recommends that further studies be conducted in the two areas of middle management leaders that are leading and managing matrixed teams within other types of matrixed organizational industries, and in a comparison study between middle management leaders that lead and manage teams within a matrixed organization as compared to a non-matrixed organization. Further study in both of these areas could potentially provide middle management leaders and matrixed organizations with a greater understanding and awareness of the matrixed organizational culture and its impact on middle management leaders.

Examination of other Matrixed Organizational Industries

The first recommended area for further study is the examination of other matrixed organizational industries. For this study, the researcher only collected data from middle management leaders within one information technology based matrixed organization. This researcher suggests that further studies be conducted of middle management leaders that are leading and managing matrixed teams within other types of matrixed organizational industries in order to see if similar themes are identified and to also see if different types of challenges exist within other types of matrixed organizations. Studying this area will help in expounding upon the matrixed organizational culture as it pertains to middle management leaders that are responsible for leading and managing matrixed teams within other types of industries where the matrixed structure is implemented and practiced.

Comparison of Middle Management Leaders in Matrixed and Non-Matrixed Organizations

The second recommended area for further study is a comparison of middle management leaders in matrixed and non-matrixed organizations. This study only took into consideration middle management leaders within an information technology based matrixed organization. This researcher and the results of this study suggest that middle management leaders have a more difficult and challenging time leading teams within a matrixed organization as compared to middle management leaders that are not in a matrixed organization. By studying this area, researchers can make a comparison between middle management leaders that are leading and managing teams within a matrixed and non-matrixed organization in order to gain a greater perspective of how the roles differ between the two types of organizational structures.

Reflections

Within this section, the researcher took time to reflect upon the study that was conducted. Specifically, the researcher discussed how conducting this study contributed to both the personal and professional growth of the researcher. The researcher also utilized this section to provide a biblical perspective of how the business functions explored in this study relate to and integrate with a Christian worldview.

Personal and Professional Growth

The researcher conducted this study to gain a greater and deeper understanding of the pivotal role of middle management leader's and the challenges they face as they seek to effectively lead and manage matrixed teams within a matrixed organizational environment. This researcher has been a middle management leader for a number of years leading and managing matrixed teams and has personally experienced first-hand many of the challenges and issues that were discussed by the interview participants. However, even with the researcher's previous experience, this research project provided the researcher with both personal and professional growth through the means of the research process that was conducted and the findings of the study.

In the area of personal growth, the researcher, by conducting this study, grew in their abilities and understanding of how to properly conduct a qualitative research study. Specifically, through the data gathering and analysis processes the researcher was able to personally develop their skills in the areas of coding, triangulation, and in the identification of themes. Additionally, the researcher would be remiss to not acknowledge his own preconceived thoughts regarding middle management leaders, matrixed teams, and matrixed organizations. By conducting this study, the researcher was able to eliminate a number of preconceived thoughts and see a number of items through a different lens, which grew the researcher on a personal level.

In the area of professional growth, the researcher grew in his understanding and knowledge of other middle management leaders and the challenges they are confronted with as they lead and manage matrixed teams. Professionally, the researcher was able to gain valuable insight into the opinions and perceptions of other middle management leaders based upon their years of experiences in leading and managing matrixed teams. Furthermore, by conducting this study, the researcher was able to expound upon and grow personally in his own profession as a middle management leader within a matrixed organization by being able to apply practical applications from the study to his everyday interactions and dealings with both his matrixed team, middle management leader peers, and top-level leaders.

Biblical Perspective

As a Christian researcher there is value in applying and discussing biblical perspectives as they relate to this study. Specifically, the researcher noted that the key business functions of middle management leaders, matrixed teams, and matrixed organizations are able to be related to and integrated with a Christian worldview. Additionally, each of these three business functions possess their own unique attributes and are able to be viewed and discussed from a biblical perspective.

Middle Management Leaders. The first business function to be presented and discussed from a biblical perspective is middle management leaders. This study found that middle management leaders have a challenging role inside the matrixed organization as they seek to effectively lead and manage their matrixed teams. The study also found that the middle management leader's role is pivotal to the success of both matrixed teams and the overall matrixed organization. From a biblical worldview integration perspective, the middle management leader must be a leader that cares for others and puts others first. Philippians 2:4

tells leaders to not look to their own interest but to look to the interest of others (English Standard Version, 2002). Additionally, Proverbs 27:23 instructs the Christian leader to know the condition of their flocks and to give attention to their herds (ESV, 2002). In adhering to these instructions, the middle management leader must be a leader that focuses on the well-being and interest of their matrixed team and their matrixed organization as they seek to effectively lead and manage within this type of environment.

Matrixed Teams. The second business function to be viewed from a biblical perspective is matrixed teams. This study found that matrixed teams are composed of individuals from different sections and departments within an organization and may also consist of individuals that are located in different parts of the country and world. These factors are what contribute to the complexity that exist within matrixed teams. From a biblical worldview integration perspective, matrixed teams should strive to work together, and team members should seek to assist one another when able. Ephesians 4:16 discusses how the body is joined together by different joints but works best and properly when all the joints are working together (ESV, 2002). When applied to matrixed teams, all members of the team should strive to work together in order for the team to function and perform the best it can. Additionally, Ecclesiastes 4:9-10 mentions how two are better than one because they can work more effectively and help each other out (ESV, 2002). Within the matrixed team environment, this biblical principle should be applied and practiced in order to bring team members together and to make matrixed teams more effective.

Matrixed Organizations. The third and final business function to be viewed from a biblical perspective is matrixed organizations. This study found that the matrixed organizational structure relies heavily upon middle management leaders to be the leaders on the ground that get

things done, lead and manage matrixed teams in achieving organizational goals and objectives, and implement organizational policies. The study also found that the matrixed organization can be a difficult and challenging organizational environment to navigate and work within. From a biblical worldview integration perspective, matrixed organizations should seek to gain insight from their middle management leaders and employees in order to develop and maintain an organizational environment that is enjoyable for all. Proverbs 20:18 notes that the best plans and wise plans are established by obtaining counsel (ESV, 2002). Within the matrixed organization, top-level leaders should seek to obtain such counsel from those within their organization, such as middle management leaders and matrixed team members, as they develop their plans, goals, and objectives. Additionally, Psalm 112:5 tells those in power that they should deal generously with others and conduct their affairs with justice (ESV, 2002). From a practical biblical point of reference, matrixed organizations should follow such instruction and deal generously and justly with all of their employees as they pursue organizational excellence and success.

Summary of Reflections

Reflection is a valuable tool that can be used to grow individuals. Within this section, the researcher took the time to reflect upon the personal and professional growth that he experienced through the means of conducting this study and how those items have impacted him and helped him to grow. Also, the researcher discussed from a biblical perspective the specific business functions of middle management leaders, matrixed teams, and matrixed organizations and how these three business functions relate and integrate with a Christian worldview.

Summary of Section Three

Section three delineated the results of this study and provided application to professional practices and recommendations for further study. Specifically, the researcher identified the

following seven themes: competing priorities among top level leaders, middle management leaders, and team members; lack of true authority at the middle management leader level; disconnect between top level leaders and matrixed teams; middle management leaders must be involved in the day-to-day work; middle management leaders must possess key skills to effectively lead and manage matrixed teams; middle management leaders must possess certain characteristic traits to effectively lead and manage matrixed teams; and globalization of the information technology industry. Through the identification of these themes, the researcher was able to answer the research questions that were posed within this study, while also gaining a greater depth of understanding surrounding the challenging and pivotal role that middle management leaders have in leading and managing matrixed teams within an information technology based matrixed organization. The researcher then closed out the section by reflecting on areas of personal and professional growth and on key business functions as presented and discussed from a biblical perspective.

Summary and Study Conclusions

The purpose of this qualitative case study was to explore the pivotal and challenging role that middle management leaders have in leading and managing matrixed teams within a matrixed organizational structure. A number of organizations in today's business world have moved away from a traditional hierarchy organizational structure and have chosen to implement a matrixed organizational structure in order to be more efficient and effective. This shift in organizational structure has significantly impacted middle management leaders by placing more responsibility on them and by presenting them with greater challenges as they seek to effectively lead and manage their matrixed teams.

The goals for the outcome of the research and study were to contribute to the body of knowledge and to reduce the gaps in the literature surrounding middle management leaders and their pivotal and challenging roll leading and managing teams within a matrixed organizational structure. The study expanded upon this by taking an in-depth look into the challenges that middle management leaders are confronted with as they lead and manage matrixed teams within an information technology based matrixed organization. Specifically, the study included 15 one-on-one interviews resulting in seven discovered themes. The seven themes that were discovered in conjunction with the existing literature provided key insight and applicable implementation strategies that can be utilized by middle management leaders that are leading and managing matrixed teams within a matrixed organizational environment and by matrixed organizations in order to better equip their middle management leaders. Furthermore, the findings of this study concluded that middle management leaders do in fact have a pivotal and challenging role leading and managing matrixed teams, but that these challenges can be overcome when proper steps and actions are taken and implemented by middle management leaders and their matrixed organization.

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Appendix A: Interview Guide

RQ1: In what ways do middle management leaders within a matrixed organization differ from top level organizational leaders?

- How is a middle management leader different from a top-level leader within a matrixed organization?
- What type of skills and traits must a middle management leader within a matrixed organization possess?
- What type of responsibilities does a middle management leader within a matrixed organization have?

RQ2: How does the matrixed organizational structure impact the ability of middle management leaders to lead effectively?

- What matrixed organizational factors contribute to the inability of middle management leaders to lead their teams effectively?
- What matrixed organizational factors contribute to the ability of middle management leaders to lead their teams effectively?
- What matrixed organizational factors impact you personally as a middle management leader as you lead and manage your matrixed teams?

RQ3: In what ways does a matrixed organizational structure inhibit team effectiveness?

- How do ineffective teams impact a matrixed organization in achieving its goals and strategic objectives?
- How can middle management leaders produce effective teams within a matrixed organization?

- How has the effectiveness of your teams been impacted by the matrixed organizational structure?

RQ4: What cultural elements are present in the information technology (IT) industry that make it challenging for middle management leaders to lead effectively inside of a matrixed organization?

- What specific elements of the information technology industry cause an organization to be matrixed?
- Which elements of the information technology industry do you as a middle management leader within an information technology matrixed organization find the most challenging as you lead your teams?

Appendix B: Observation Form

Middle Management Leader Interaction with Matrixed Team	
Middle Management Leader Displayed Challenges	
Middle Management Leader Leadership Practices	
Middle Management Leader's Team Effectiveness	
Middle Management Leader's Team Ineffectiveness	
Matrixed Team Behavior	
Matrixed Team Effectiveness	
Matrixed Team Ineffectiveness	

Appendix C: Permission Request Letter

April 5, 2022

Ms. Terresa Allen

Manager – HR Business Partner

Verizon Business

6400 Weston Parkway

Cary, NC 27513

Dear Terresa,

As a doctoral student in the Business Department at Liberty University pursuing a Doctor of Strategic Leadership, I am conducting research to examine the ability of middle management leaders to effectively lead matrixed teams inside an information technology based matrixed organizational structure by asking research questions related to the following: middle management leader responsibilities and roles within a matrixed organization; the matrixed organizational structure; factors that impact team effectiveness within a matrixed organization; and the cultural elements of an information technology organization that make it matrixed and a possible challenge for middle management leaders to lead effective teams. The working title of my research project is the Middle Management Leader and the Matrixed Organization, and my study method will be a Case Study. This is a Doctoral Research Project and neither the research project nor the results will be published. At the completion of the study, I will provide your organization with a final manuscript and will also be available to make a presentation of the research project and results.

I am writing to request your permission to conduct my research at your organization and contact your employees to gain their participation in this study. Taking part in this study is completely voluntary, and participants are welcome to discontinue participation at any time. I welcome an opportunity to discuss this with you further and to answer any question you might have.

Thank you for considering my request. If you choose to grant permission, I will need a signed statement indicating your approval.

Sincerely,

Donald Keith Stephens

Doctoral Student

Liberty University School of Business

Phone: [REDACTED]

Email: [REDACTED]

Appendix D: Permission Response



6400 Weston Parkway
Cary, NC 27513

April 14, 2022

Dear Donald Keith Stephens,

This letter is to confirm approval and permission to interview middle management leaders as part of your research for your doctoral program at Liberty University.

If you require additional information, please do not hesitate to contact me at [REDACTED]

Sincerely,

A black rectangular box redacting the signature of Teresa Allen.

Teresa Allen
Manager – HR Business Partner