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A Phenomenological Study of Exemplary Corporate Learning and Development Leaders

Leading From the Heart

A Dissertation by

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University of Massachusetts Global

A Private Nonprofit Affiliate of the University of Massachusetts

Irvine, California

School of Education

Submitted in partial fulfillment of the requirements for the degree of

Doctor of Education in Organizational Leadership

February 2022

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February 2022

A Phenomenological Study of Exemplary Corporate Learning and Development Leaders

Leading From the Heart

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Finally, it was the right time to pursue this doctorate, but commitment and support from others was paramount. I find that to be so true and thus thanking my family and friends is of utmost significance. As I complete this final step in my journey, I am filled with fulfillment and gratitude to those who supported me along my journey. To my loving parents Shafiq and Zainab, who graced me with your love and support throughout your life and beyond. The memory of you fills my heart with your encouragement and inspiration and that carries me through difficult times and allows me to find the strength to follow my heart. To my dear husband Alaa, you have seen me through my teaching credential, master's degree, different employment journeys, and now through my doctorate studies and graduation. I am grateful for your support, assistance, and commitment to our family and our children. I thank you for your unconditional love, steadfast support, for believing in me, and for making me feel special every day. My most beautiful daughter Reema, your strength, confidence, and big heart make proud to be your mom. I am proud of the journeys you're pursuing and feel lucky to be able to witness your achievements! To my amazing son Firas, your strength, love, and compassion give me strength and fill my heart with pride. I am in awe of your tender heart and your mighty determination. It gives me the power to stare at the sun and defy obstacles. To my son Naseem, your kindness, wisdom, and warmth fill my heart with the will to be strong and to persevere. You have always managed to come through for me with your advice and compassion. You inspire me to be strong and resilient.

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ABSTRACT

A Phenomenological Study of Exemplary Corporate Learning and Development Leaders

Leading From the Heart

by Randa Jad-Moussa

Purpose: The purpose of this phenomenological study was to describe how corporate learning and development leaders lead from the heart using Mark Crowley's (2011) 4 principles (building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements) to accomplish extraordinary results in their organizations.

Methodology: This study followed a qualitative phenomenological research study to describe the lived experiences of exemplary corporate learning and development leaders. Eight corporate learning and development leaders were selected from the target population in publicly traded technology companies in the state of California. Each of the corporate learning and development leaders was interviewed in a semistructured open-ended, one-to-one interview protocol developed by a group of peer researchers. Data from artifacts were used to triangulate the research results. Transcripts were analyzed and synthesized for themes using NVivo coding software.

Findings: Examination of qualitative data from the participating 8 exemplary corporate learning and development leaders in this study produced various findings. Analysis resulted in 20 themes and 466 frequencies. From these 20 themes, 9 key findings emerged.

Conclusions: The study identified the behaviors that exemplary learning and development leaders practice within their corporate technology organizations to create

engagement, connections, appreciation, and maximization of potential as identified by Crowley (2011) in their organizational heart-led leadership framework. The researcher drew 5 conclusions from the data and findings. Exemplary learning and development leaders create conditions for organizational growth and productivity by (a) working alongside their team members to build engagement, motivation, transparency and trust; (b) communicating authentically with their team members to build emotional connections; (c) establishing a safe space and communicating positively to increase creativity and innovation; (d) showing appreciation to boost engagement and motivate higher achievement; and (e) creating opportunities for growth to increase productivity and loyalty.

Recommendations: Further research in heart-led leadership is necessary. Research to identify specific behaviors that leaders across the organization practice to engage, connect, maximize potential, and honor and reward achievement to all members of their organizations should be conducted. This study should also be replicated in other regions and company profiles with different cultural values.

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PREFACE

Upon consideration and discussions regarding the opportunity to study Mark Crowley's (2011) leadership from the heart strategies of exemplary leaders, 14 researchers with the collaboration of five faculty advisors, from education to corporate America, organized to form this thematic study. The thematic study is driven by a shared passion to explore the ways exemplary leaders lead from the heart to achieve extraordinary results.

The framework for this phenomenological research study was designed using Mark Crowley's four principles: building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements. Each peer researcher studied a different population of leaders and identified a sample of exemplary leaders through criterion-based purposeful sampling from various public, for-profit, and nonprofit organizations to interview. In an effort to ensure consistency and reliability throughout the thematic study, the team of 14 peer researchers worked in collaboration to construct the purpose statement, research questions, definitions of terms, interview questions, and research study protocols.

Throughout the study, the term *peer researchers* is used in reference to the 14 researchers in the thematic study. The following is the complete list of the doctoral candidates, along with their chosen population in this research study, hereafter referred to as peer researchers: Giovanna Arzaga, charter executive directors; Aimee Barnard, special education administrators; Kelly Castillo, elementary principals; Joshua Chohan, elementary Title I principals in Sacramento County; Jeyan Danesh, secondary administrative principals; Christina Foster, middle school principals; Martha (Stephanie)

Herrera, entrepreneur women leaders of small business; Teresa Hubbard, primary principals in Southern California; Randa Jad-Moussa, learning and development leaders in corporate organizations; Angela Love, community college chief human resource officers; Elizabeth Medina, Hispanic entrepreneur women; Aries Sanders, leaders of remote sales/marketing employees; Jeanine Wulfenstein, female superintendents, and Sepideh Yeoh, K-12 superintendents in Southern California.

CHAPTER I: INTRODUCTION

The past decade has witnessed a dramatic evolution of work and the worker, triggered by a number of significant factors including a globalized economy; flatter organizations; global, multigenerational workforce with diverse value profiles; and sweeping, constantly changing technologies and information (Crowley, 2011; Friedman & Mandelbaum, 2012; Groysberg & Slind, 2012). Increasing complexities on many fronts have intensified the crucial role of a vibrant knowledge-based workforce. The digital revolution had many ripple effects on the competitive advantage of the business workplace. Perhaps the most important outcome of the digital revolution is the need for a workforce that continually learns, innovates, and adapts to change. If organizations are to keep pace and thrive, they must persistently respond through learning, reskilling, and upskilling to ambiguity, fast-changing technologies, and knowledge with a short shelf-life (Brassey, Christensen, & van Dam, 2019).

The demand for new skills and knowledge has increased the importance of the role that learning and development leaders play in meeting an organization's need for change and productivity. When this demand for learning is coupled with a crisis like the COVID-19 pandemic and demand for new technologies and skills, the impact can be catastrophic. It overpowers an organization's ability to learn, relearn, and respond quickly.

This demand for learning deepens the direct and urgent need to focus organizational resources on ensuring that the workforce has the knowledge and skills necessary to succeed. Leaders in all sectors of American business as well as leaders of all organizations of society are facing a spectrum of management challenges and

sweeping technology changes that demand a focus on learning (Dess & Picken, 2000; Drucker, 2007; Friedman & Mandelbaum, 2012; Groysberg & Slind, 2012). In response to this demand for learning, organizations are placing learning and development leaders in a more prominent role and influence as they respond to the demand for innovation and change.

For many organizations, this learning and growth mindset is critical to doing things better in a competitive global environment (Bersin & Zao-Sanders, 2019). Bersin and Zao-Sanders (2019) noted that with 80% of CEOs expressing their challenge by the need for new skills for their knowledge worker employees, learning is the broadest commonality among them. For employees, besides the nature of work itself, learning is the second most important need and reason for work satisfaction (Bersin & Zao-Sanders, 2019).

According to Brassey et al. (2019), the responsibilities of learning and development leaders are clear: to develop the people who support the success of the organization across five main areas. These areas are attracting and retaining talent, developing people capabilities, engaging talent, fostering a learning culture, and building an employer brand (Brassey et al., 2019). Learning and development leaders oversee a variety of functions, one of which is the work of instructional designers. Brassey et al. described the work of instructional design to include an assessment of capabilities and learning gaps, design of learning journeys, development of training modules, scaling of training material, aligning with institutional strategy, measuring, and evaluating the impact. The commonality between all of the responsibilities of learning and development leaders is the dependence on the concept of changing people's knowledge and skills

through lifelong learning. Instructional design is the field of practice of learning and development leaders. Learning and development leaders build the learning strategy for the current and future needs of the organization while managing the work of their staff using learning theories, adult learning principles, technology, evaluation, and assessment (Brassey et al., 2019; Drucker, 2007).

Background

Learning and development have become a vital component of American enterprise because the digital revolution transformed the workforce into the most important asset in its economy (Deane, 2020; Drucker, 2007). Knowledge workers are the backbone of their organizations because they hold the power and have the competitive advantage of their industry through their ability to effectively and efficiently consume and create new knowledge (Dess & Picken, 2000; Drucker, 2007). Learning and development leaders have the influence to leverage the power of both technology and information to achieve extraordinary results by creating a learning culture built on the principles of engagement, connections, maximizing potential, and rewarding achievement (Crowley 2011).

The 21st century transformed workplaces from industrial manufacturing of goods and products to an information-based, service economy. Within just a few decades, the American economy was driven by innovation, knowledge, services, and processes (Groysberg & Slind, 2012). Technological changes have made possible new and different communication mechanisms and tools (Friedman & Mandelbaum, 2012; Schwarzmüller, Brosi, Duman, & Welp, 2018). As such, changes in communication patterns stemmed from and reflected the power dynamics in the workplace. This resulted

in multidirectional communication and revealed engagement in value-creating work at varying levels of the organization (Drucker, 2007; Groysberg & Slind, 2012). And as if these changes, challenges, and opportunities were not enough, generational diversity and varying value profiles posed vast challenges to leadership and organizational sustainability (Friedman & Mandelbaum, 2012; Groysberg & Slind, 2012).

To compete in America's 21st-century economy and gain competitive advantage, knowledge workers, and therefore, their organizations must be able to effectively and efficiently consume and create new knowledge (Dess & Picken, 2000). In their new and evolving roles, knowledge workers are the experts of their domains, the owners of their dynamic knowledge and skills. They continually develop their problem-solving skills, which require divergent and convergent thinking (Drucker, 2007). Lifelong adult learning has become integral to organizational well-being and sustainability, on the one hand, and to the individual growth, advancement, and long-term employment, on the other hand (Beer & Nohria, 2000; Carnall, 1999; Higgs & Rowland, 2001; Kotter, 1994; Senge et al., 1999). Learning and development leaders assume an important leadership in role planning, organizing, and directing an organization's workforce preparation. They are the experts in recognizing their organization's current and future learning needs. In their role, they must build a learning strategy within a learning culture that recognizes the need for engagement as vital to team collaboration, personal connections between leaders and their staff, understanding and maximizing employee potential, and celebrating and rewarding achievement (Brassey et al., 2019). In brief, learning leaders need to lead from the heart to facilitate a culture of learning that aims to achieve maximum results and benefits for the organization and for the individual worker of the organization. With their

knowledge in the field, leaders and their teams can prepare organizations to grow and thrive and employees for lifelong learning and employability.

Theoretical Foundations

Leaders in organizations have to contend with a variety of organizational challenges including the rise of leadership theories that changed the way leaders' roles are defined and how they engage with their employees in the 21st-century workplace (Barton, Grant, & Horn, 2012; Lawrence, 2013). This dissertation focuses on five leadership theories that discuss leadership engagement and communication with employees. These theories are especially aligned with the *lead from the heart* principles, which are central to an effective leader-follower relationship (Crowley, 2011). These theories are relational leadership, transformational leadership, servant leadership, and authentic leadership. Additionally, this dissertation highlights the qualities that define exemplary leadership in organizations.

Relational Leadership

Relational leadership defines a mutually dependent relationship between leaders and followers in which both parties build trust that influences their relationship and communication (Hollander, 1978, 2009). It is the leader's role and goal to recognize the significance of followers as critical assets for organizational growth and, as such, employ relationships to move them and the organization to operate at varying levels pursuant to organizational development (Branson & Marra, 2019). At its core, relational leaders exhibit considerate support through a relationship-based behavioral style that translates into strong, trusting working connections (Uhl-Bien, 2011).

Transformational Leadership

While all leadership approaches influence their followers and organizations, transformational leaders inspire their followers and motivate the organization to get engaged and take actions that change and benefit the organization and themselves as pillars of the organization (Bass & Riggio, 2006; Northouse, 2019). Organizations seek transformational leaders who can cultivate a culture of collaboration that helps advance organizational performance and productivity while also improving the employees' work quality and job satisfaction (Anderson & Ackerman Anderson, 2010). Bass (1990) identified four significant components of transformational leadership where leaders serve as charismatic role models for their employees who inspire others, demonstrate genuine concern for their followers, and challenge them to be innovative. Transformational leaders expand and uplift the interests of their employees by engendering their employees' understanding and buy-in by engaging followers in creative problem-solving and trying new approaches (Bass & Steidlmeier, 1999).

Servant Leadership

Greenleaf (1998) described servant leaders as those who put the needs of their followers ahead of their own needs. While transformational leaders aim to build collaborative relationships, the desire to serve is at the core of servant leadership. Servant leaders endeavor for self-awareness and regulation within a positive perspective and role modeling (Avolio & Gardner, 2005). Furthermore, the most salient attributes of servant leadership are honesty, trust, empathy, listening, commitment to people, and organizational growth (Russell & Stone, 2002).

Authentic Leadership

In a like manner to servant leadership, role modeling is central to authentic leaders whose actions embody their life experiences and psychological abilities such as optimism and resilience. They also represent the organization's principles, ethics, and values (Avolio & Gardner, 2005). Avolio and Gardner (2005) posited that authentic leaders empower their followers by demonstrating that a positive reality exists and they communicate about it with their followers. The purpose of authentic leadership, as Avolio, Gardner, Walumbwa, Luthans, and May (2004) described it, is in helping people make real connections built through self-awareness, trust, and transparency for the essential goal of creating a significant effect on the organization, the followers, and the authentic leaders themselves. Perhaps the actual value of authentic leadership is best understood as juxtaposed against the pressures and sometimes maligned practices of capitalist leaders, as expressed by B. George (2003). He contended that while capitalism offers individuals and organizations the economic freedom to pursue financial incentives of exponential growth, the stresses of meeting investors' demand clouds the judgments of too many leaders, and short-term gains cut at the core value of living in dignity. Authentic leadership, B. George (2003) explained, offers the need to make a difference while still living a worthwhile life and interacting with leaders who model trust and authenticity.

Kouzes and Posner's Model of Exemplary Leadership

Regardless of the leadership style or styles a leader subscribes to, achieving exceptional results is what all leaders aim to accomplish. Kouzes and Posner (2003) maintained that leadership experiences that are most effective are found across

disciplines and throughout diverse organizations. Nonetheless, they also maintained that there is a set of leadership qualities and practices common to those leaders who lead their followers to accomplish their best performance through exemplary leadership (Kouzes & Posner, 2003). Kouzes and Posner constructed these practices into a model they called the five practices of exemplary leadership framework. These practices exist with all exemplary leaders across a wide range of organizations, and they are not exclusive to a distinct group of employees or people. They, however, are practiced broadly among all followers of specific leaders (Kouzes & Posner, 2003). These practices are the following:

Modeling the way. Leaders act as role models demonstrating the sought-after behavior themselves. Thus, they conduct themselves in ways they do embody as leaders (Kouzes & Posner, 2003). Leaders first define their values and expectations to lead by example within principles that are well defined for themselves and clear to others (Kouzes & Posner, 2007). Leaders who want to be exemplary must lead by example by committing their words to action and ensuring that their values and those of their constituents are aligned and affirmed.

Inspiring a shared vision. Exemplary leaders possess the ability to perceive things that have not happened yet and set the vision to achieve them. Visionary leaders pursue this vision of the future but, more importantly, inspire their followers to see the future as a genuine reality and work hard to make it happen. Exemplary leaders craft a pathway into the unknown by sharing their passion boldly and communicating their vision clearly (Kouzes & Posner, 2007).

Challenging the process. Challenging the existing conditions is the highlight of leadership. Defying the status quo and taking risks is how exemplary leaders venture into innovation, defining failures as learning opportunities and inspiring others to persist notwithstanding challenges. Kouzes and Posner (2007) suggested that as leaders think outside the box, they seek new ideas and ways of looking at and responding to them. They get inspired by the good ideas of anyone, anywhere, and challenge “the system to adopt those products, processes, services, or systems that improve the way things are done” (Kouzes & Posner, 2007, p. 17).

Enabling others to act. To make visions come true, leaders enable others to act. They move their teams from vision to reality through trust and empowerment. They ensure that all team members move toward goal achievement and win as a team and individually. They do so by engaging team members in decision making, taking ownership in goal setting, and mobilizing team members to take action and be accountable (Kouzes et al., 2007).

Encouraging the heart. Recognizing the accomplishment of team members and reassuring them that their contributions are appreciated and taken seriously, exemplary leaders recognize individual efforts and celebrate team achievement. The act of rewarding success ensures that people see the benefit of behavior supported by their individual and team values. Kouzes and Posner (2017) asserted that taking vivid actions or modest activities helps move teams from vision to reality. By taking bold actions or simple gestures to show appreciation, team leaders demonstrate that value is celebrated as a community. Showing genuine public encouragement for a job well done in a personal, genuine way can be the most inspiring impact a leader can make.

Theoretical Framework

When Mark Crowley (2011) decided to write *Lead From the Heart* as a testament to the power of relationships in accomplishing highly uncommon team and individual achievement and engagement, he explained that he wrote it because his principles were not common in business. Crowley clearly understood the need to pay people with “emotional currency” (Ahamed, 2016, n.p.). He emphasized four main principles, which are all central to building a healthy and productive relationship between leader and follower. Research points to Crowley’s (2011) principles of building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievement in various ways but put together; they are the pillars of the leading from the heart leadership style (Crowley, 2011, 2015).

Building a Highly Engaged Team

Macey and Schneider (2008) described engagement as having the feeling of content and satisfaction that comes from being valued and having a strong relationship with one’s employer. However, employee engagement is touted by human resource professionals as a desirable attribute that is both behavioral and attitudinal (Macey & Schneider, 2008). Consistent with that description, Saks (2006) explained that engagement is a unique concept that comprises intellectual, emotive, and behavioral constituents related to the individual role performance.

Connecting on a Personal Level

Connecting with employees at a personal level involves creating a culture of reciprocal, active communication between leaders and followers (Crowley, 2011; J. E. Glaser, 2014; Groysberg & Slind, 2012). Building relationships with employees is

central to managing organizational change (Crowley, 2011; Groysberg & Slind, 2012). Promoting dialogue through varied forms of communication brings people together and closer and allows leaders to listen to employees from all levels of the organization. It also allows employees to open up and be good listeners connected to their work and their organization (Groysberg & Slind, 2012).

Fundamental to employee connectivity is the value of trust, where trust is assessed on a continuum of low to high, based on the employee's perception of trust in the organization and other stakeholders. J. E. Glaser's (2016) arc of engagement offers trust on a continuum from the resistor on the low end to the co-creator on the high end. Trust is so important because without it members of the team would find it difficult to connect with their leader and to engage with them and other team members knowing that they are in a safe environment (B. Brown, 2015).

Another concept reflective of connecting on a personal level is the notion of compassion. Compassionate leaders understand others' viewpoints, positions, and/or feelings or experiences. P. Howard and O'Brien (2018) maintained that upholding compassion in the workplace has a high potential to reduce stress and increase productivity.

Maximizing Employee Potential

This leadership quality is very much connected to employee engagement. By creating an inclusive culture and developing the team's strengths and commitment, leaders who recognize their employee's potential, encourage their staff to bring their whole self to work and do their best every day. Employees give their maximum contributions by observing and being engaged and committed to the organizational

success without thinking about what is in it for “me” but instead what is in it for “us” (Gebauer, Lowman, & Gordon, 2008). Employers motivate their employees to grow and develop by recognizing their potential and strengthening and teaching their employees to achieve better (DiLiello & Houghton, 2006).

Valuing and Honoring Achievement

When leadership values employee contributions, hard work, and commitment to the organization’s success, it implies that leadership is connected to followers at a deeper level. However, knowing that the organization values its employees is not enough. Setting a reward and recognition system would be an “expression of care” (Crowley, 2011, p. 122) beyond the financial value of raises or monetary awards. Mark Crowley (2011) cited Bruce Cryer’s justification for the value of acknowledging employee hard work and contributions:

The art of stopping to appreciate actually is a tremendous source of renewal [for people] and helps widen their perspective about the achievability of whatever challenges they still have to face. . . . Challenges ahead become more manageable and doable because they have the immediate perspective of accomplishing something – and knowing it was appreciated. (pp. 122-123)

Instructional Design and the Role of Learning and Development Leaders

The role of learning and development leaders and their teams is to provide learning and growth to the workforce in meaningful and effective ways. It is the responsibility of learning and development leadership to ensure quality, competitive, and engaging learning design and to support design teams in their roles (Brassey et al., 2019). While learning and development is the overarching function under which instructional

designers design and develop learning, the need for effective leadership developed because of the complexity of the field as the demand for quality learning expanded (Ward Oda, 2018).

To effectively move their organizations through change both technologically and culturally, leaders in learning and development work to develop the human capital of organizations (Brassey et al., 2019). They specifically work to attract and retain talent knowing growth and development is a top priority for both the organization and individuals. These leaders also develop people capabilities including their knowledge and skills. Furthermore, Brassey et al. (2019) explained that learning and development leaders build a value-based culture and a sense of community especially as more of the workforce is becoming more globally distributed and often virtual. And as the talent pools continue to shrink, learning and development leaders aim to attract top talent by building strength around the organization brand. Therefore, learning and development leaders must engage and motivate talent by developing their competencies and growth potential for future trends to be leading-edge innovative (Brassey et al., 2019; Shaw, 2012). By developing experiences that respond to the workforce needs, instructional design builds on the theories of adult learning and learning theories to produce learning material. Using instructional media and technologies that best respond to these learning needs is an essential component of instructional design. Instructional design also makes use of immediate access to information, performance support tools, and curated learning and training content that is easily accessible and applicable (Bersin & Zao-Sanders, 2019).

Briefly, learning leaders develop people and push the organization's vision, and to do so, they demonstrate commitment to a collaborative growth culture with the common goal of offering learners exceptional, future-focused learning experiences (Ashbaugh & Piña, 2014; Gardner, Chongwony, & Washington, 2018; Shaw, 2012). They invest in the people as much they are invested in achieving the organization vision and goals while also keeping an eye on what learning happening in their immediate present and the imminent future. Learning leaders who are successful are excellent orchestra leaders and they are attuned to every facet of their work.

Statement of the Research Problem

Among many critical 21st-century world and business challenges, and in light of the COVID-19 crisis, organizations need to consider the wide range and complex problems they are facing: fast-changing transformative technology, doubling the pace of information faster than ever before; global, multigenerational, predominantly knowledge-based workforce with varying profiles and needs; environmental threats of every facet and magnitude; political and regional uncertainties; and widening global economic disparities. These challenges account for a continual need for training to bridge the skills and knowledge gaps arising every day (Drucker, 1999, Friedman & Mandelbaum, 2012; Groyberg & Slind, 2012). While some organizations recognize the need to have learning and development teams address their specific workers' continuous knowledge and skill demands, some organizations still address their varying learning needs relying on some off-the-shelf training material. The challenge for these organizations is that they fail to build a growth mindset around continual learning, and they also fail to develop the

heart-led leadership skills that are necessary to attract and develop top talent (Gino & Staats, 2015).

While transformational leadership among the C suite or the executive-level managers of organizations is essential, it is equally imperative that learning and development leaders build a positive culture of innovation and learning through leading from the heart. If they do not cultivate the power of their teams to work collaboratively and make work meaningful for their teams and the organization, innovation through learning will diminish and organizations will collapse (Ananga, 2020; Fogarty et al., 2020; Smith, 2020). Research points to the fact that the lack of a learning culture can be a barrier to organizational innovation and success. If learning leaders do not leverage the unique expertise of their team members to serve the entire organizational community with empathy and connection that brings about the best potential of their teams while also rewarding their savvy initiative, organizations will decline and fail (Crowley, 2011; d’Orville, 2020; Sneader & Singhal, 2020; Vinikas, 2021; Wang, Liu, Qian, & Parker, 2020).

In corporate settings, Kennedy (2018) noted that learning is value-driven and stems from and supports organizations’ competitive advantage and bottom line. It is no surprise that successful organizations align their learning plans with their strategic business goals (Kennedy, 2018). To that end, learning in professional settings aims not only to inform and bridge the skill or knowledge gaps but also to train learners for the anticipated future trends and thus helps position organizations to better compete, outperform, or be the celebrated first (Crowley, 2011; Dumas & Beinecke, 2018; Kennedy, 2018; Ward Oda, 2018). Moreover, learning happens everywhere and takes on

various forms including but not limited to the classroom. These varying demands, environments, and goals have immediate implications for corporate learning designer profiles and leadership needs, and for fundamentals. However, value is a two-way experience. While organizations that develop a learning culture benefit from employee job satisfaction, productivity, and profit, 93% of employees indicated that they would continue to work for organizations that invested in their learning and prepared them to continue to grow and compete even as their experiences and challenges change (Vinikas, 2021).

To achieve these goals and positively respond to the demand and challenges of their organizations, learning and development leaders need to put strategic plans in place to support their organizations. By doing so, they also play a pivotal role in leading through innovation and creativity and convert challenges into opportunities. To support a workforce that is willing and able to participate in accomplishing extraordinary results for their organizations, learning and development leaders align with their organization's competitive advantage. They lead their teams through engagement and authentic connections to achieve extraordinary results (Crowley, 2011; Dumas & Beinecke, 2018; Ward Oda, 2018).

Purpose Statement

The purpose of this phenomenological study was to describe how exemplary learning and development leaders in technology companies in California use Mark Crowley's (2011) heart-led principles of building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements to lead their teams to accomplish extraordinary results.

Research Questions

Central Question

How do exemplary learning and development leaders in technology companies in California use Mark Crowley's (2011) heart-led principles of building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements to lead their teams to accomplish extraordinary results?

Subquestions

1. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by building a highly engaged team?
2. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by connecting on a personal level?
3. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by maximizing employee potential?
4. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by valuing and honoring achievements?

Significance of the Problem

This study is significant on multiple levels across the organization and learning community. It is important to individual employees whether learning staff or those on the receiving end of learning. It is also equally meaningful to organizations and the broader field of learning and development.

This study is important for individuals working in organizations where learning and innovation are needed for the growth of employees as well as the organization. As 21st-century skills and digital transformation have become the foundation of success in

organizations, leaders in learning and development must create value (Ashbaugh, 2013; DeBlois, 2005). While leadership in organizations is defined in terms of a variety of capabilities ranging from overseeing technology change, leading through ambiguity, being tech-savvy, and managing talent demographics within diverse working environments, the bottom line of every leadership role is value (Ashbaugh, 2013; Goleman, 2000; Volini et al., 2019). And exemplary leaders, as Crowley (2011) suggested, are those who can create value and achieve extraordinary results by forming highly engaged teams, connecting on a personal level, maximizing employee potential, and valuing and honoring achievement. This study aims to explore how exemplary learning and development leaders create an environment where applying Crowley's principles of leading from the heart can motivate and encourage learning designers to achieve extraordinary results in their work. For learning designers and their leaders being innovative in designing and developing learning material is central to productivity and the competitive advantage of the organization in which they work (Bersin & Zao-Sanders, 2019; Crowley, 2011; Kremer, Villamor, & Aguinis, 2019; Sarder, 2016).

This study is significant because it spotlights learning and development leaders as organizations' indispensable and foundational power. They are leaders of change, continuity, and sustainability, and by being tasked with creating a culture of curiosity, experimentation, and innovation, learning leaders are vital to organizational continuity and competitiveness in an ever-evolving knowledge-based economy (T. Brown, 2016; Peljko, Jeraj, Šavoju, & Marič, 2016; Soriano & Huarng, 2013; Watson, 2018). In the age of information, knowledge production has shifted from doubling every century in the 1900s to doubling every 12 hours in 2020, and it is projected to increase even more

(Chamberlain, 2020; Crossan & Berdrow, 2003; Sandle, 2018). Arguably, the volume of knowledge is not what is most challenging to individuals and organizations. It is developing the skills to analyze, synthesize, and employ this knowledge through innovation that is of most significance. However, without learning teams' efforts to develop these skills through learning, organizations will fall behind and even fail (Chamberlain, 2020; Crossan & Berdrow, 2003). Learning and development leaders who do not focus on the transformational power of heart-led principles risk disengaging their followers and teams across the organization as a whole. Results from this study will provide learning leaders with the tools to lead from the heart in an increasingly complex environment of ambiguity, competitiveness, and innovation.

Effective learning leaders recognize the value of a learning strategy built within a learning culture powered by the heart-led principles (Brassey et al, 2019; Kouzes & Posner, 2017). Such a corporate learning strategy should comprise proactive plans to create a learning culture where learning and development teams are embedded within every function of the organization. In the end, organizations should have an understanding that there is no growth without continual learning as a vital foundation to competitive advantage (T. Brown, 2016; Friedman & Mandelbaum, 2012; Michaelis & Markham, 2017; Sarder, 2016; Terosky, 2014). This is important for individual employees and their leaders as well as the organization as a whole. Vinikas (2021) pointed out that 93% of employees report that they will stay with a company that invests in their development. Leaders and organizations benefit from improved productivity and innovation and increased profits, and customers appreciate and benefit from knowledgeable employees. Yet, leaders do not always develop the environments

necessary for their followers to be productive and innovative (Kremer et al., 2019). This study aims to develop the needed understating of the value of effective learning and development leaders bring to the organizational culture.

This research is important and necessary if learning and development leaders are to effectively accomplish their role as innovative change agents in a constantly changing world (Ashbaugh, 2013). By exploring the competencies that exemplary learning and development leaders identify as vital to the achievement of extraordinary results in organizations, this study can inform the design of learning and development preparation programs. Developing people is a complex task and requires a lot more than the knowledge and skills of the future (Brassey et al., 2019). It requires a vested interest in building team and individual relationships on a personal level driven by real concern for the well-being and functioning of the people individually and collectively, and this study brings attention to that. In fact, organizations benefit from this study because it gives them insight into how learning leaders help organizations benefit from the improved expertise of their employees and reduced employee turnout, and the cost associated with hiring and training new employees (Sarder, 2016; Vinikas, 2021).

By the same token, this study will help fill the gap in research on learning and development leaders' essential role in the growth and sustainability of organizations because it validates the value they bring to organizations, employees, and customers. On the other hand, it confirms the need for the expertise of competent, visionary learning leaders who can balance their organization's priorities with the need for heart-led leadership to accomplish those priorities (Chamberlain, 2020; Crowley, 2011; Vinikas, 2021). Furthermore, knowledge gained from this research can help build a framework

for learning leadership development in the enterprise as well as in educational settings. As has been noted, the immediate beneficiary of this study is learning and development leaders who end up complementing their expertise and value with the proficiencies of heart-led leadership, and how it transforms the learning culture of organizations (Crowley, 2011; Sarder, 2016).

Definitions

Terms and definitions for this study are provided in this section. Definitions are discipline specific and situated in research to provide meaning and context. They clarify the terms related to the study. Definitions were established collaboratively by the team of peer researchers participating in the thematic dissertation on conversational leadership.

Building a highly engaged team is using strategies that help people become enthusiastically invested in and dedicated to work they believe is significant, meaningful, and challenging, where relationships are built on emotional connection and shared vision, and where values and commitment are based on personal strengths and interests aligned with organizational goals (Crowley, 2011; P. S. George & Stevenson, 1988; Rees, Alfes, & Gatenby, 2013; Senge, Lichtenstein, Kaeufer, Bradbury, & Carroll, 2007).

Connecting on a personal level is seeing and acting on behalf of others and authentically communicating with the intention of adding value driven by humility, concern, and love (B. Brown, 2015; Crowley, 2011; Hayward, 2015; Maxwell, 2010).

Maximizing employee potential is igniting emotional drivers by promoting human well-being while proactively strengthening, teaching, and building people toward high achievement (Burnett & Lisk, 2019; Crowley, 2011).

Valuing and honoring achievements is praising, acknowledging, recognizing, and appreciating positive accomplishments as an expression of care through monetary and/or nonmonetary rewards, which may lead to increased job satisfaction (Brun & Dugas, 2008; Crowley, 2011; Posamentier, 2008; Tessema, Ready, & Embaye, 2013).

Modeling the way is establishing sought-after behavior by demonstrating it themselves and thus conducting themselves in ways that they do embody as leaders (Kouzes & Posner, 2003). It is defining their values and expectations so that they can lead by example within well-defined parameters (Kouzes & Posner, 2007).

Inspiring a shared vision is perceiving things that have not happened yet and setting the vision to achieve them. Then pursuing this vision of the future and inspiring followers to see the future as a genuine reality and to work hard to make it happen, crafting a pathway into the unknown by sharing their passion boldly and communicating their vision clearly (Kouzes & Posner, 2007).

Challenging the process is challenging the existing conditions and defying the status quo then taking risks to venture into innovation, defining failures as learning opportunities and inspiring others to persist notwithstanding challenges. Thinking outside the box and seeking new ideas and ways of looking at things and responding to them by getting inspired by the good ideas of anyone, anywhere, and challenging “the system to adopt those products, processes, services, or systems that improve the way things are done” (Kouzes & Posner, 2007, p. 17).

Enabling others to act is making visions come true by enabling others to act through trust and empowerment, engaging team members in decision-making, taking ownership in goal setting, and mobilizing team members to take action and be

accountable, ensuring that all team members move toward goal achievement, and winning as a team and individually (Kouzes & Posner, 2007).

Encouraging the heart is recognizing the accomplishment of team members and reassuring them that their contributions are appreciated and taken seriously by recognizing individual efforts and celebrating team achievement. The act of rewarding success to ensure that people see the benefit of behavior that is supported by their individual and team values. Taking vivid actions or modest activities helps move teams from vision to reality (Kouzes & Posner, 2007).

Caring leadership is showing kindness, empathy, and understanding that builds relationships that bring people together around a common goal. Caring leaders demonstrate warmth and genuine interest in people and treat others with mutual acceptance and respect (Kautz, 2013; Maxwell, 2013; Tabor, Madison, Marler, & Kellermanns, 2020; Tomkins & Simpson, 2013).

Learning and development leaders are responsible for attracting and retaining talent and creating a value-based culture of engagement and motivation through developing programs that ensure that the organization is constantly evolving and developing (Brassey et al., 2019). These leaders manage teams of learning designers and learning specialists who identify learning gaps and unforeseen future needs among an organization's teams and individuals and develop the strategies and learning plans necessary to bridge these gaps and align employee goals and performance with those of the organization (Ashbaugh, 2013).

Delimitations

This study was delimited to eight exemplary learning and development leaders in technology companies in the state of California. An exemplary learning and development leader in this study is a leader who can provide evidence of caring for people in the organization with a minimum of 3 years as a learning and development leader in their organizations with at least two of the following criteria:

1. Evidence of extraordinary results
2. Articles, papers, or materials written, published, or presented at conferences or association meetings.
3. Recognition by peers
4. Membership in a professional association in their field

Organization of the Study

This study is comprised of five chapters, references, and appendices. Chapter I provided an introduction of heart-led leadership, background on theories and the study variables, statement of the problem, the research purpose, theoretical definitions, and the delimitations of the study. Chapter II presents what is known about the five business trends impacting organizational leadership, leadership theories influencing the leader-follower dynamics of the relationship, the four elements of Crowley's (2011) lead from the heart principles, and the role of learning and development leaders in organizational engagement, connectivity, communication, and recognition. Chapter III explains the research design and the methodology of the study, including the study population and sampling procedures for data gathering and analysis. Chapter IV presents and analyzes

the findings of the study. Chapter V concludes the study with a summary of findings, conclusions, and recommendations for further research.

CHAPTER II: REVIEW OF THE LITERATURE

Leading from the heart is quickly becoming a vital component of organizational success and competence as organizations strive to meet the demands of the 21st-century challenges and opportunities. Traditional top-down leadership models are growing obsolete and vastly ineffective in the face of the massive global changes confronting the world (Friedman & Mandelbaum, 2012; Groysberg & Slind, 2012). The technological, informational, organizational, generational, and economic challenges have exerted tremendous pressure on organizations to keep up and continually evolve to address these changes through constant learning. The imperative for learning is an opportunity that world economies and organizations of every size and impact take quite seriously.

Chapter II provides an in-depth, yet succinct summary of the body of work connected to these changes, and the shift in leadership practices that the next generation of leaders must practice while leading their organizations from the heart. Technological, demographic, informational, organizational, and economic changes are addressed as they were identified as having the most significant impact on 21st-century organizations. A theoretical background of leadership outlines the concepts of transformational leadership, relational, authentic, servant, and exemplary. Following this background, the body of work related to Crowley's (2011) four principles of leading from the heart are presented. Chapter II ends with an overview of history and current status of instructional design as it relates to leadership and organizational learning and the role of the learning and development leader in organizational learning followed by a summary crafted to review the major concepts and ideas.

Introduction

Massive Global Changes

Changes in the world around us have had immediate and foundational effects on organizational structures, processes, and, most notably, leadership (Dess & Picken, 2000; Friedman & Mandelbaum, 2012). The value of adequately readied and effective leadership could not have been more acutely underscored than in the second quarter of 2020 in the wake of the COVID-19 crisis. Leadership in the 21st century has gone through the most turbulent and promising times, and the effects of leadership vision, strategy, and decisions have been felt widely and deeply across organizations of every configuration, scale, and reach (Friedman & Mandelbaum, 2012). Global complexity, uncertainty, and change have fueled the depth of challenges faced by organizations locally and worldwide and have furthered the need for effective leadership that is relationally accountable and globally engaged. To add to this complexity, identifying an appropriate, applicable, and adequate leadership framework is challenging regardless of the sector (Lawrence, 2013).

The multitude of challenges organizations have today turned leadership structures upside down and have required leadership approaches that are more nurturing of change and supportive of learning and growth. Leaders and workers alike must have the opportunity for continuous learning. Leaders need to embrace continuous learning as both a personal and an organizational value to create a culture of growth and competitiveness (Price & Lisk, 2014). Tomorrow's leaders have to learn to anticipate and respond to changes in technology, information systems, fast organizational change, and a diverse workforce to lead successfully.

Technological change. Organizations in the 21st century are facing a technology frenzy. The Internet of Things, robotic process automation, 3D printing, blockchain, augmented reality, and virtual reality all promise to do things faster, cheaper, and more autonomously. Add to those changes social media, constant communications, virtual meetings, and work from home, and organizations have encountered change in enduring ways. Leaders have little option but to adopt new technologies as quickly as possible. Changes in digital technologies give rise to quality and effectiveness demands in the workplace, which mostly make it inevitable to have a different kind of employee training, engagement, and relationship with leadership (Schwieters & Moritz, 2017). With technologies continuously advancing or fading, leaders need to be constantly on the lookout for what is new and effective and train their employees to use or interact with it.

Informational change. Workers in the knowledge economy of the 21st century are engaged in productivity patterns that are heavily influenced by a dynamic flow of information. This has urgent implications for their power dynamics in the workplace, which results in a flatter organization as leaders seek to acquire and retain top talent (Drucker, 1999; Groysberg & Slind, 2012). The main benefit of flat organizations is that they include fewer layers of management and employees enjoy more independence and empowerment, which allows them to take managerial decisions on routine basis (Ingram, 2019).

Employees want to continue to learn new skills and develop their competencies. While that need for continuous learning and development does not change, technology does. As research from Deloitte states, “Employees at all levels expect dynamic, self-directed, continuous learning opportunities from their employers” (Pelster, Haims,

Stempel, & van der Vyver, 2016, p. 57). In this report by Pelster et al. (2016), 14 Dutch-based executives from multinational organizations participated in survey and interview research. The results from this research show that organizations vary considerably in which trends they practice, but that there are some main trends that most multinationals have in common that help create a sustainable workforce and motivate them to become more innovative, adaptable, and productive. Those developments include mobile learning, microlearning, gamification, knowledge sharing, informal learning technologies, content management systems, self-directed learning, individualized learning, and immersive learning (Ghiciuc, n.d). A combination of these approaches supports continuous learning. Employees are not only welcoming of learning opportunities for growth and development within organizations, but they are also demanding of it as an incentive to stay with an organization. Vinikas (2021) pointed out that 93% of employees report that they will stay with a company that invests in their development. This trend has empowered employees and provoked a more collaborative and more heart-led approach to leadership (Crowley, 2011; Friedman & Mandelbaum, 2012).

Organizational change. Effective communications also came as a result of this economic change and carried with it employee empowerment and a change from the top-down communication patterns to a same level communication of one-to-one communication between employees and their leadership (Friedman & Mandelbaum, 2012). This communication is viewed as essential to organizational innovation and critical to supporting organizational and leadership vision and strategy (Friedman & Mandelbaum, 2012; Groysberg & Slind, 2012). This resulted in a flatter organization and

an exceptionally added value to followers in impacting organizational sustainability and competitive advantage (Drucker, 1999; Friedman & Mandelbaum, 2012).

Demographic change. Currently, organizations have a very demographically diverse workplace across gender, age, educational background, and tenure or professional experience. On the one hand, there is the influence of these demographics on the leadership style used, and on the other hand, there is the challenge that these changes in demographics require different kinds of leadership qualities and behavior in order to elicit the desired performance results (Woolf, 2021). The American enterprise currently includes multiple age groups with varied personal and professional profiles working together and demanding different treatment from their leadership. The current workplace is replete with a majority of millennials born in the early 1980s. While some research states that this generation, in addition to baby boomers and Generation X, pose direct challenges to leadership (Henson, 2009), other research found differences between baby boomers, Generation Xers, and millennials to be minimal and in some cases hardly existent (Woolf, 2021). Woolf (2021) noted that although age issues continue to create challenges, including microaggression, bias, and bullying, when it comes to being tech savvy, the three generations rated more equally than not on how their technology skills compare to others on their team. What is interesting is that more millennials found themselves frustrated with technology at work more than baby boomers or Gen Xers. In the end, all three generations expressed their need for continual training and upskilling to keep up with technology demands, changes in the workplace, and personnel dynamics (Woolf, 2021).

When it comes to gender, there is an abundance of literature on differences in perspectives of women versus men leaders as well as the richness that comes from understanding and catering to the unique traits and perspectives of males versus females or the opposite in the workplace. And while minimal differences in performance seem to exist between women and men (Woolf, 2021), gender and gender identity have unique traits that can affect the workplace and the way leadership needs to address them. Additionally, the American workplace is also diverse with respect to educational background and tenure or professional experience. This diversity can result in miscommunication, interaction barriers, and dysfunction in adaptation behaviors (Neeley, 2015). This will produce differences in opinions, traditions, thought processes, trends, and values. All of these variations can impact how leadership needs to address these differences uniquely and effectively.

Economic change. Massive economic changes are occurring around the world (Friedman & Mandelbaum, 2012). One of the drivers of these changes is the globally open and interdependent economies around the world in addition to the growth of global markets and economic opportunities in Asia, India, Africa, and Latin America. Leaders facing the global economy encounter many challenges as they try to lead their organizations across the global borders (Perez, 2017). Some of these challenges are political, social, environmental, legal, and economic. At its core, global leadership deals with a combination of influence and change across global borders. Effective leaders are challenged to navigate the complexities of merging economic and political, social, and cultural realities across the globe in addition to the technological adaptation they need to

account for across the global landscape of their organization and the global communities they serve (Perez, 2017).

The Imperative of Learning

In America's 21st-century economy, literature on change management and change leadership acknowledges the more enduring and essential aspects of change in organizations (Drucker, 2007). To compete in the new economy and gain a competitive advantage, knowledge workers, and therefore, their organizations, must be able to consume new knowledge (Dess & Picken, 2000) effectively and efficiently. This crucial imperative of lifelong adult learning has become integral to organizational well-being and sustainability (Beer & Nohria, 2000; Carnall, 1999; Conner, 1999; Higgs & Rowland, 2001; Kotter, 1994; Senge et al., 1999). Higgs and Rowland (2001) identified eight different competencies for change leadership. Of these competencies, change learning and change technology are most relevant to this review.

Higgs and Rowland (2001) proposed a leader competency development model. It indicates that a well-thought-out approach to developing competencies coupled with effective change leadership would yield a well-defined influence on an organization's ability to deliver the sought-out change in the business. Understandably, learning leaders are only one part of this equation. Of course, constantly shifting markets, technological transformations, and political instability, are the basis for Clark and Gottfredson's (2008; Ward Oda, 2018) compelling argument for continuous learning. As a matter of fact, they proposed that corporate learning be anchored in thoughtfully established knowledge and skill needs in anticipation of or in response to market changes.

Against this background, a brief review of the American corporate workplace quickly revealed the compounding reliance on artificial intelligence, big data, and increasingly more sophisticated technologies (Davies, Diemand-Yauman, & van Dam, 2019). Similarly, organizations are increasingly challenged with how to cope with and prepare their employees to compete and stay relevant to the continuing employment requirements that their employers need (Davies et al., 2019). Companies offer trainings and upskilling; nevertheless, digital transformation offers many more challenges than what episodic training efforts can accomplish. Moreover, for organizations to effectively compete, they need to build their learning solutions to reflect their current strategic and future growth needs (Brassey et al., 2019). Davies et al. (2019) proposed lifelong learning as the pathway for long-term employment so long as organizations have a well-articulated imperative for continuous improvement where leaders inspire their employees by being learning role models themselves (Ritchie & Earnest, 1999). This clearly has direct implications for learning leaders and instructional designers and may prove to be equally critical to both organizations and learning teams and their leaders.

Theoretical Foundation

Leaders in organizations have to contend with a variety of organizational challenges and the rise of leadership theories that changed the way leaders' roles are defined and how they engage with their employees in the 21st-century workplace (Barton et al., 2012; Lawrence, 2013). This dissertation focuses on five leadership theories that discuss leadership engagement and communication with their followers, which are the qualities especially highlighted in *Lead From the Heart* as central to effective leader-follower relationship (Crowley, 2011). These theories are relational leadership,

transformational leadership, servant leadership, and authentic leadership. Additionally, this dissertation highlights the qualities that define exemplary leadership in organizations.

Relational Leadership

Relational leadership defines a mutually dependent relationship between leaders and their followers, wherein both parties build trust that influences their relationship and communication (Hollander, 1978, 2009). For the sake of clarity, followers here are team members working with a leader even though these relationships are flatter than traditionally thought. It is the leader's role and goal to recognize the significance of followers as critical assets for organizational growth. Then the leader uses their relationships to move across different functions of the organization to help accomplish the goals of the organization in terms of organizational development (Branson & Marra, 2019). At its core, relational leaders exhibit considerate support through a relationship-based behavioral style that translates into strong, trusting working connections (Uhl-Bien, 2011).

Relational leaders are inclusive, responsive, and empathetic because they understand how important it is for their followers to feel appreciated and supported in the work they do (Fredericks, 2009). These leaders definitely understand the value their followers bring to the organization, and they want to motivate their teams to always contribute their best as the most important capital to the bottom line. In a sense, relational leadership brings a social aspect to the traditional individualistic practice of leadership (Crevani, 2015). By bringing the dynamic relationship between leader and follower to the front, Crevani (2015) argued that other perspectives help re-frame a foundationally basic understanding of reality and outlooks to leadership.

Transformational Leadership

While all leadership approaches influence their followers and their organizations, transformational leaders inspire their followers and motivate the organization as a whole to get engaged and take actions that change and benefit the organization overall and themselves as pillars of the organization (Bass & Riggio, 2006; Northouse, 2019).

Organizations seek transformational leaders who can cultivate a culture of collaboration that helps advance the organizational performance and productivity while also improving the employees' work quality and job satisfaction (Anderson & Ackerman Anderson, 2010).

Transformational leadership is an approach to organizational change in which the organizations undergo significant shifts to ensure the future success of the organization. Leaders engage and inspire team members to jointly identify problems and collaboratively work with them to create and implement their vision for solving them (Druskat, 1994; Ghasabeh, Soosay, & Reaiche, 2015). As a result of the process, organizations and their team members are changed from followers into leaders and the organization morphs into a new and improved state.

Bass (1990) identified four significant components of transformational leadership in which leaders serve as charismatic role models for their employees and who inspire others, demonstrate genuine concern for their followers, and challenge them to be innovative. Transformational leaders expand and uplift the interests of their employees by engendering their employees' understanding and buy-in by connecting with their followers in creative problem-solving and trying new approaches (Bass & Steidlmeier, 1999).

Bass (1990) identified multiple principles that contribute to the success of transformational leadership and four key principles in addition to what C. Howard (2018) referred to as compassion; these are discussed in the following paragraphs (see also Figure 1).



Figure 1. Transformational leadership model. From “Transformational Leadership: Leading Change Through Growth and Empowerment,” by Educational Business Articles, 2021 (<https://www.educational-business-articles.com/transformational-leadership>).

Idealized influence. Simply identified as the trait of charisma in the original writings of Bernard Bass (1985), charisma was later renamed idealized influence by Bass and his colleagues (Avolio & Bass, 1995). Bass (1997) himself explained, “Charismatic leaders, or leaders with idealized influence, are role models for their followers. They are admired, respected, and trusted” (p. 21). This explanation points away from the traditional thinking of charisma and shifts to an emphasis on the ability to influence idealized views. Idealized influence encompasses the areas of charisma, ethical leadership, and trust (Norzailan, Yusof, & Othman, 2016). Idealized influence thus

became further defined as a compilation of traits that allows the leader to model and influence others using emotional influence.

Intellectual stimulation. Providing everyone in the company a voice in the transformational process empowers intellectual stimulation. As a principle, intellectual stimulation “propels knowledge sharing in the company to generate more innovative ideas and solutions” (Canty, 2005, p. 1438). Generating a shared vision and sharing knowledge increases ideas, energy, and growth toward achieving new ideas.

Inspirational motivation. As a principle, the topic of inspirational motivation can serve as one of the fundamental beliefs grounded under the discussion of transformational leadership. It encompasses inspiring followers and incentivizes them to act. In agreement, Malloch (2014) defined inspiration as being a new approach that may be needed to improve “human achievement and well-being” (p. 60). Further in their empirical study, Jandaghi, Matin, and Farjami (2009) shared that those transformational leaders both motivate and inspire by ensuring that employees or subordinates have an investment in solving the problem(s) identified.

Individualized consideration. A leader maintains focus and tenacity in the face of adversity and challenge. Hard work and commitment result in the accomplishment of the vision (Avolio & Bass, 1995). Leaders have to explain their vision concerning perseverance. Leaders have to role model their resolve in the face of adversity and resistance. Being the right role model is the best way to demonstrate that success is a hard endeavor and determination is the best principle to achieve it.

Two themes that continue to arise around transformational leadership are compassion and trust. That’s because there is no inspiration without trust and no respect

and trust without compassion. These two attributes are essential to any leader, but they are especially vital to transformational leaders because they engage with their people at a deeper level and propel them to take risks with them while aspiring for extraordinary results.

Trust. Fundamental to employee connectivity is the value of trust where trust is assessed on a continuum of low to high based on the employee’s and other stakeholders’ perception of trust in the organization. J. E. Glaser’s (2016) arc of engagement offers trust on a continuum from the resistor on the low end to the co-creator on the high end. Figure 2 depicts the different levels of trust moving from “I” on the low end to “we” on the higher end of the spectrum.

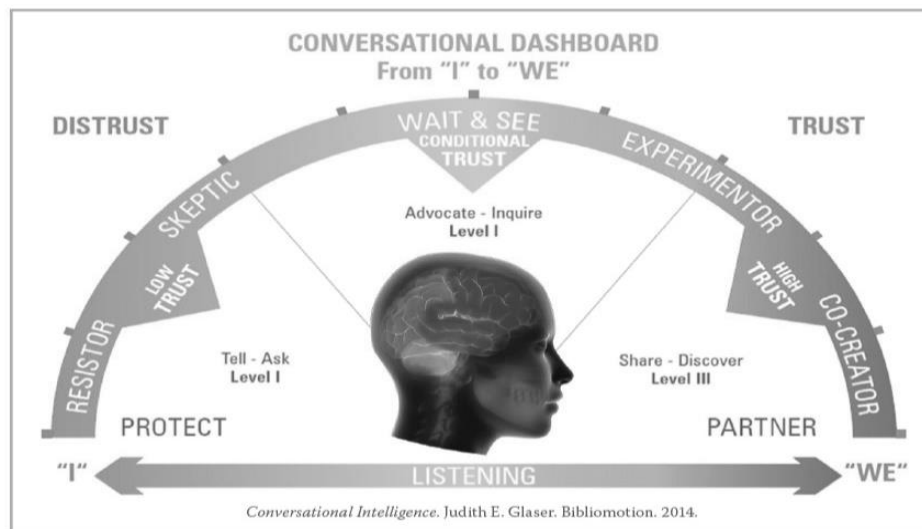


Figure 2. Conversational dashboard: The “arc of engagement” (gauge). From *Conversational Intelligence: How Great Leaders Build Trust and Get Extraordinary Results*, by J. E. Glaser, 2016, p. 93. New York, NY: Routledge.

Trust is essential in every relationship (Turaga, 2013). It is indispensable to building psychological safety around which people can work together to achieve a common goal. Trust is viewed as an outcome of leadership behavior and can result in

positive outcomes from followers such as attitudes and behaviors and superior performance (Burke, Sims, Lazzara, & Salas, 2007; Yukl, 1989). Some research even asserts that trust in transformational leaders can motivate followers to engage on an exceptional level (Frazier, Tix, & Barron, 2004). J. E. Glaser (2014) pointed to five steps to building trust among stakeholders. The first step starts with leaders opening up about what is happening around them. This may require elements of authenticity, transparency, and even vulnerability to be present. The second step is leaders telling their team members where they stand and building authentic relationships with them. This is simply engendering a real sense of fitness for the job and whether they are good enough for it. The third step is building a sense of understanding through communicating with context to explain the full picture. J. E. Glaser explained that leaders need to be clear about their intentions and long-term goals. Providing context helps eliminate confusion and this builds stronger more trusting understanding. The fourth step is to demonstrate how the team and leader win together by acknowledging team members' contributions; the leader embraces their success as instrumental to the team success. Finally, trusted leaders tell the truth all the time. There is no value in embellishing the truth to make things look better.

Trust in this context is reflective of and vital to Crowley's (2011) four principles of heart-led leadership. Leaders build engagement and connections through transparency, and vulnerability to build buy-in and commitment. They also nurture understanding and courage to develop authentic relationships built on the truth of what a team member's potential is and what their contributions to the shared success are.

Compassion. The final principle of transformational leadership includes compassion. Compassion is simply explained as the understanding of others' viewpoints, positions, and/or feelings or experiences. In general, compassion is a well-documented principle of transformational leadership discussed in the literature as being as extremely important, when upheld, as having high potential to reduce stress and increase productivity (C. Howard, 2018).

Servant Leadership

Greenleaf (1998) described servant leaders as those who put the needs of their followers ahead of their own needs to ensure their followers' growth and the growth of the organization. And just as transformational leaders aim to serve, the desire to serve is also at the core of servant leadership. Servant leaders endeavor for self-awareness and regulation within a positive perspective and role modeling (Avolio & Gardner, 2005). What makes servant leadership so distinct from other leadership styles is that servant leaders attempt to flatten the hierarchical structure of organizations and work with equals by building strong interpersonal relationships with their teams (van Dierendonck, 2011). While Greenleaf coined the term "servant leader" in his book *The Servant as a Leader* in 1970, he did not offer a precise definition of the term *servant leader* (van Dierendonck, 2011). This allowed for some influential models of servant leadership to develop such as Spears (1995), Laub (1999), Russell and Stone (2002), and Patterson (2003).

By working with different edited and unedited volumes of Greenleaf's work on servant leadership, Spears (1995) was able to identify 10 characteristics of servant leaders including listening, empathy, healing, awareness, persuasion, conceptualization, foresight, stewardship, commitment to the growth of people, and building community.

But because the model lacked specific categorization, it was difficult to operationalize these characteristics for empirical research (van Dierendonck, 2011). Based on an extensive literature review, Laub (1999) developed six clusters of characteristics that he used as the foundation for his measure of servant leadership. Similarly, Patterson's (2003) model identified seven dimensions of servant leadership based on virtue theory that dates back to Aristotle. This last model provided extensive work on the notion of the need to serve but is lacking in terms of leader qualities (Patterson, 2003).

Van Dierendonck (2011) identified six different servant leader behaviors as experienced by the followers. These behaviors include empowerment, humility, authenticity, interpersonal acceptance, providing direction, and stewardship, and together they provide the operationalized definition of servant leadership. First, empowering and developing aims to motivate people and instill self-confidence. It also encourages the belief that acknowledging followers' accomplishments, abilities, and what they can learn will motivate followers to be self-aware and self-directed. Second, humility refers to leaders' acknowledgment of their strengths coupled with the need for the expertise of others. Servant leaders demonstrate responsibility for the people they work with but support them and assist them to perform better while also pushing them to the front when tasks have been accomplished successfully (Greenleaf, 1996). Third, leaders have to be authentic and reflective of their own true thoughts and self. They need to practice authenticity, integrity, honesty, and the general social and organizational moral code with vulnerability and trustworthiness whether privately or publicly (Harter, 2002; Luthans & Avolio, 2003; Russell & Stone, 2002; van Dierendonck, 2011).

Fourth, interpersonal acceptance is having empathy and the capacity to understand the feelings and experiences of others and where they are coming from when they are holding a grudge. It is the ability to take on the authentic perspectives of others with compassion, forgiveness, and the ability to develop nonjudgmental trust with them (Ferch, 2005; J. M. George, 2000; van Dierendonck, 2011). Fifth, leaders must provide direction to team members based on their knowledge of each employee's abilities and needs and pursuant to better fit and better understanding of what is needed of them (Laub, 1999). This would result in a more dynamic workplace with more interpersonal relations among leaders and followers in which problems are approached in new ways (Ferris et al., 2009; Russell & Stone, 2002; van Dierendonck, 2011). Finally, stewardship is taking responsibility for the overall organization by emphasizing its role as role model service-oriented leaders who not only take care of others and the organization but as socially responsible leaders who act for the common good of the organization (van Dierendonck, 2011).

When all these characteristics of servant leaders are put together, they represent the different models found in the literature. They are the foundations of what servant leaders stand for and the interconnected elements of the concept of servant leadership. This model resonates with the heart-led principles on multiple levels. Practicing authenticity and self-awareness to be engaged and connected with others is important for leaders. Then empowering others to bring their true self and utilize full their potential at work is consistent with maximizing employee potential. Finally, taking care of others and the organization through role modeling is reflective of leadership that is fully engaged in incentivizing their followers to do their best.

Authentic Leadership

In a like manner to servant leadership, Avolio and Gardner (2005) maintained that role modeling is central to authentic leaders where their actions embody their life experiences and psychological abilities such as optimism and resilience. They also represent the organization's principles, ethics, and values (Avolio & Gardner, 2005). Avolio and Gardner maintained that authentic leaders empower their followers by demonstrating a positive reality to exist and communicate with their followers. The purpose of authentic leadership as Avolio et al. (2004) described it, is in helping people make real connections built through self-awareness, trust, and transparency. The essential goal is to create a significant effect on the organization, the followers, and the authentic leaders themselves. Perhaps the real value of authentic leadership is best understood as juxtaposed against the pressures and sometimes maligned practices of capitalist leaders as expressed by B. George (2003). B. George contended that while capitalism offers individuals and organizations the economic freedom to pursue financial incentives of exponential growth, the stresses of meeting investors' demand clouded the judgments of too many leaders and short-term gains erode the core value of living in dignity. Authentic leadership, B. George explained, offers the need to make a difference while still living a worthwhile life and interacting with leaders who model trust and authenticity.

Like servant leadership, authentic leadership means that leaders bring their authentic selves to leadership by focusing on who they are as human beings (B. George, Sims, McLean, & Mayer, 2007; Skidmore, 2018). The Andy Skidmore model of authentic leadership places self-awareness as a foundational component of leadership by

understanding leaders' strengths and through deliberate coaching from other leaders to achieve self-regulation and self-control. Leaders who are self-aware can focus on others by first learning how to self-reflect on what gives them the ability to help others. In other words, leaders who examine themselves with courage and honesty accept vulnerability as a path to self-awareness, and by doing so, they become more transparent and authentic human beings whose behaviors are reflective of their internal values and who are able to withstand external pressure and influence (Avolio & Gardner, 2005; B. George et al., 2007; Skidmore, 2018).

According to Skidmore (2018), the next level in authentic leadership is building genuine relationships with others inspired by truthfulness, service, and trust. By being transparent and real, authentic leaders seek relationships with others motivated by the desire to serve rather than focus on their self-interest. Therefore, their relationships are powered by the benefit for others (Skidmore, 2018). Authentic leaders also realize that they cannot succeed alone and without the support and council of others they trust and who trust them. According to B. George et al. (2007), forging such strong relationships is foundational to strong authentic leaders because without their team's honest perspective, it is easy for leaders to be misguided. Third, Skidmore (2018) underscored the significance of focusing on values objectively and attempting to understand them without preconception or discrimination. This will allow leaders to make decisions built on character and transparency rather than on predetermined judgements (Avolio & Gardner, 2005; B. George et al., 2007). Fourth, the Skidmore model presents the concept of service from an authentic leadership perspective where leaders are expected to put others and their needs ahead of themselves and their own personal needs. In that sense,

authentic leaders, like service leaders, value we above me and create a culture of belonging. Finally, according to Skidmore (2018), authentic leaders create a vision of the future built on the deep commitment and solid foundations of the four other principles. A vision for the future is what brings them and their teams together to achieve a defined common goal as long as it is anchored in self-awareness, genuine relationships, common values, and service (see Figure 3).



Figure 3. Authentic leadership model. From “Adopting an Authentic Leaders Mindset,” by Andy Skidmore, October 27, 2018, *Burn Bright* (<https://medium.com/@andyskidmore/adopting-an-authentic-leaders-mindset-bd7995705ea8>).

Kouzes and Posner’s Model of Exemplary Leadership

Regardless of the leadership style or styles a leader subscribes to, achieving exceptional results is what all leaders aim to accomplish. Kouzes and Posner (2003) maintained that the most effective leadership experiences are found across disciplines and throughout diverse organizations. Nonetheless, they also maintained that there is a set of leadership qualities and practices common to those leaders who lead their followers to

accomplish their best performance through modeling exemplary leadership. They constructed these practices into a model they called the five practices of exemplary leadership framework (Kouzes & Posner, 2003). These practices exist with all exemplary leaders across a wide range of organizations, and they are not exclusive to a distinct group of employees or people. They, however, are practiced broadly among all followers of specific leaders (Kouzes & Posner, 2003; see Figure 4). These practices are the following:



Figure 4. Kouzes & Posner's model of exemplary leadership. From *The Leadership Challenge*, by J. M. Kouzes & B. Z. Posner, 2017. Copyright 2017 by John Wiley & Sons (see also http://en.headstartchina.com/the_leadership_challenge).

Modeling the way. Leaders first define their values and expectations so that they can lead by example within well-defined parameters (Kouzes & Posner, 2007). They determine what is important to them and why it is important, then they need to affirm their shared vision for the organization and their teams. Leaders then act as role models demonstrating the sought-after behavior by demonstrating it themselves and thus conducting themselves in ways they embody as leaders (Kouzes & Posner, 2003).

Inspiring a shared vision. Exemplary leaders possess the ability to perceive things that have not happened yet and set the vision to achieve them. Visionary leaders pursue their vision of the future but more importantly inspire their followers to see the

future as a genuine reality and work hard to make it happen. Exemplary leaders craft a pathway into the unknown by sharing their passion boldly, communicating their vision clearly, and appealing to the shared desires and ambitions of their followers (Kouzes & Posner, 2007).

Challenging the process. Challenging the existing conditions is the highlight of leadership. Defying the status quo and taking risks is how exemplary leaders venture into innovation, defining failures as learning opportunities and inspiring others to persist notwithstanding challenges. Kouzes and Posner (2007) suggested that as leaders think outside of the box, they seek new ideas and ways of looking at things and responding to them. They get inspired by the good ideas of anyone, anywhere, and challenge “the system to adopt those products, processes, services, or systems that improve the way things are done” (Kouzes & Posner, 2007, p. 17).

Enabling others to act. To make visions come true, leaders enable others to act. They move their teams from vision to reality through trust and empowerment. Engaging team members in decision-making, taking ownership in goal setting, and mobilizing team members to take action and be accountable, ensures that all team members move toward goal achievement and win as a team and individually (Kouzes & Posner, 2007).

Encouraging the heart. Recognizing the accomplishment of team members and reassuring them that their contributions are appreciated and taken seriously is key to the model of exemplary leadership. Exemplary leaders recognize individual efforts and celebrate team achievement. The act of rewarding success ensures that people see the benefit of behavior that is supported by their individual and team values. Kouzes and Posner (2017) asserted that taking vivid actions or modest activities helps move teams

from vision to reality. Praise and encouragement are important when the climb to the top is hard. Leaders who lead for excellence know that they sometimes need to take bold actions or simple activities to inspire their teams to persist to the glorious end (Kouzes & Posner, 2017).

Summary

According to the leadership theories discussed above, the field of leadership shifted its attention from leader characteristics and attributes to their behavior in developing and strengthening their relationships with their stakeholders (Burns, 1978). According to Sarikaya and Erdogan (2016), those leaders who achieved high levels of accomplishment with their teams are those who built and developed strong relationships with their employees. This study examined relational, transformational, authentic, servant, and exemplary leadership theories. One of the most recurring themes among these theories is the flat relationship between leaders and followers. Leaders intentionally build relationships with their teams and strive to be authentic and trustworthy in these relationships. They also endeavor to model their expectations coupled with a strong desire to connect with and understand the needs, potential, and goals of their staff.

Theoretical Framework

Lead From the Heart Principles

When Mark Crowley (2011) decided to write *Lead From the Heart* as a testament to the power of relationships in accomplishing highly uncommon team and individual achievement and engagement, he explained that he did it because his principles were not common in business. Mark Crowley clearly understood the need to pay people with

“emotional currency” (Ahamed, 2016, n.p.). He emphasized four main principles, and they are all central to building a healthy and productive relationship between leader and follower. Research points to these principles in various ways, but put together, they are the backbone of the leading from the heart leadership style (Crowley, 2011, 2015).

Building a highly engaged team. Engagement is described as the feeling of contentment and satisfaction that comes from being valued and having a strong relationship with the employer. However, employee engagement is touted by human resource professionals as a desirable attribute that is both behavioral and attitudinal (Macey & Schneider, 2008). Consistent with that description, Saks (2006) provided engagement as an unique concept that comprises intellectual, emotive, and behavioral constituents related to the individual role performance.

Building a highly engaged team requires using strategies that help people become enthusiastically invested in and dedicated to work they believe is significant, meaningful, and challenging. Engagement also comes from building relationships on emotional connection and shared vision, and where values and commitment are based on personal strengths, and interests are aligned with organizational goals (Crowley, 2011; P. S. George & Stevenson, 1988; Rees et al., 2013; Senge et al., 2007).

Connecting on the personal level. Connecting with employees at a personal level involves creating a culture of reciprocal, active communication between leaders and followers. Building relationships with employees is central to managing organizational change (Crowley, 2011; Groysberg & Slind, 2012). Promoting dialogue through various forms of communication brings people together and closer and allows leaders to listen to employees from all levels of the organization. It also allows employees to open up and

be good listeners who are connected to their work and their organization (Groysberg & Slind, 2012).

Maximizing employee potential. This leadership quality is very much connected to employee engagement by creating an inclusive culture and developing the team's strengths and commitment. Employees give their maximum contributions by observing and being engaged and committed to the organizational success without thinking what is in it for "me" but instead what is in it for "us" (Gebauer et al., 2008). Maximizing employee potential is igniting emotional drivers by promoting human well-being while proactively strengthening, teaching, and building people toward high achievement (Burnett & Lisk, 2019; Crowley, 2011).

Valuing and honoring achievement. When leadership values employee contributions, hard work, and commitment to the organization's success, it implies that leadership is connected to followers at a deeper level. However, knowing that the organization values its employees is not enough. Setting a reward and recognition system would be an "expression of care" (Crowley, 2011, p. 122) beyond the financial value of raises or monetary awards. Crowley cited Bruce Cryer's justification for the value of acknowledging employees' hard work and contributions:

The art of stopping to appreciate actually is a tremendous source of renewal [for people] and helps widen their perspective about the achievability of whatever challenges they still have to face. . . . Challenges ahead become more manageable and doable because they have the immediate perspective of accomplishing something – and knowing it was appreciated. (Crowley, 2011, pp. 122-123)

Valuing and honoring achievements is praising, acknowledging, recognizing, and appreciating positive accomplishments as an expression of care through monetary and/or nonmonetary rewards, which may lead to increased job satisfaction (Brun & Dugas, 2008; Crowley, 2011; Posamentier, 2008; Tessema et al., 2013). Crowley's (2011) principles connect with the theoretical foundations of relational, transformational, servant, authentic, and exemplary leadership on a variety of levels. First, there is the mutually dependent relationship between leader and follower marked by the interest of the leaders to motivate their staff to bring their best achievement to their work. According to Crowley, leaders need to develop an engaged team that is as much invested in the good of the organization as they are in themselves. This concept is parallel to an exemplary leadership concept of modeling the way where leaders uphold the shared vision of the organization and the best way to achieve it by doing it themselves first (Kouzes & Posner, 2007).

While exemplary leaders focus on the heart as a way to connect with employees, Greenleaf (1998) asserted that servant leaders act with vulnerability and humility to build effective relationships and put the needs of their followers and the organization ahead of their own needs. Crowley's (2011) principles mirror all of these leader attributes in the way they build an engaged team and develop personal connections with their followers while still being transparent and committed to the benefit of the organization and the individuals in it. Moreover, leaders who are authentic build connections with their staff based on truthfulness, compassion, and trust (Skidmore, 2018). This resonates with Crowley's (2011) second principle of building enduring connections between leaders and followers anchored in humility, love, and concern. Finally, Crowley's principles of

maximizing employees' potential and honoring their achievement reflect the transformational leadership concept of inspirational motivation where leaders motivate and inspire by ensuring that their followers are invested in solving problems and achieving best results (Avolio & Bass, 1995) as much as their leaders are invested in bringing out the best in them and rewarding their accomplishments.

Instructional Design and Learning and Development Leadership

Instructional Design

This section is dedicated to laying out an understanding of instructional design as a paradigm in education, first in terms of the theoretical principles, and second in terms of application. Understanding this field is important because it explains the foundational pillars of the practices and behaviors of learning and development leaders and their staff. Furthermore, the field of instructional design provides learning and development leaders and their followers both the theoretical and conceptual frameworks that guide their design. It also provides them with the practical tools and media by which develop, deploy, and present their learning content (Spar, Dye, Lefkowitz, & Pate, 2018). While this field has evolved tremendously over the last century or so, the profound changes in technology and pedagogy have advanced by leaps and bounds in the last few decades because of changes in learner and organizational needs and innovation in information and technology that continue to grow beyond imagination (Sharif & Cho, 2015).

In the theoretical principles section, first, research into instructional design and training can be traced to World War II. Next, came the programmed instruction movement, followed by the polarization of behavioral objectives movement and the criterion-referenced testing movement. Next, came Gagné's domains of learning

research followed by the Sputnik effect and the indirect launch of formative evaluation. Next, the early instructional design methods and the periods of the 1970s, 1980s, and 1990s leading to the current times. In the application section, the first two parts of the discussion are dedicated to the definition, history, and role of instructional design in education. In the next two parts, there's a description of e-learning and the role instructional design plays in shaping the educational practice in e-learning. Finally, there's a discussion of the role and contributions of instructional design and e-learning to the corporate learning and development environment.

What it is. Molenda, Reigeluth, and Miller Nelson (1983) defined instructional design as the field that is concerned with understanding and refining instructional processes by outlining, defining, and describing the best methodologies to achieve specific goals regarding the achievement of the desired change in learners' knowledge and skills. It is the organized method of developing learning and training material according to a reliable system (Reiser & Dempsey, 2007). It is involved with theoretical principles and the practical procedures of instructional strategies and methodical processes for developing and implementing those approaches within the broader field of instructional technology (Molenda et al., 1983; Reiser & Dempsey, 2007). It exists to address educators' needs, help resolve difficulties in education, and explain the link between educational theory and instructional practice within a design-focused rather than a description-focused framework (Molenda et al., 1983). This means that instructional design is involved with the methods and approaches needed to accomplish goals rather than focusing on the results of learning (Reigeluth, 1999).

Therefore, instructional design is dedicated to the study of learner performance problems and the instructional design process. The instructional design process aims is needed and necessary to improve learning performance in instructional and workplace setting. It involves design, development, implementation, evaluation, and management of learning activities and resources needed and necessary to improve learning performance in instructional and workplace settings (Reiser, 2001b). The design of instructional practice has its sources in a variety of principles rooted in such disciplines as educational psychology, cognitive science, systems theory, psychology, philosophy, anthropology, communication, and organizational theory (Reigeluth, 1983). When instructional theories are put into practice for instructional development, they are set into procedural guides and protocols. These process models are the roots of instructional system development, which itself is rooted in the highly intertwined system approach and behaviorist psychology.

History and origins of instructional design in education. The field of instructional design and technology covers both the application process of the design procedures and use of resources, on the one hand, and the theoretical foundations and research upon which the practice processes are built, on the other hand. While the early attempts at instructional design centered on the creation of training material for the military and industry, management interest in these trainings was justified as a low-cost, fast way to deliver learning (Hawkrige, 2002; Reiser, 2001b). At the same time, identification of the research and theory behind the practice is just as important as the practice and processes themselves.

Theoretical principles. This section discusses how instructional design models came to be influenced by trends of the time. Several design models evolved over the years. They mostly have a common framework of analysis for instructional problems followed by the design, development, deployment, and assessment of the instructional material used to address these problems.

Reiser (2001b) stated that the origin of instructional design traces back to World War II when some educators were tasked with doing research for the purpose of developing training material for the military. These researchers included Robert Gagné, Leslie Briggs, and John Flanagan (Reiser, 2001b). They were very influential in identifying the characteristics of the material developed based on the instructional principles established at the time. These principles were built on current instructional theories combined with research of the time on learning, human behavior, and assessment for both screening and performance evaluation including a detailed task analysis of some military tasks (Reiser, 2001b).

The programmed instruction movement that ran between the mid-1950s and the mid-1960s was a systems approach developed headed by B. F. Skinner and approximated in its approach an empirical approach to learning analysis (Reiser, 2001b). Skinner proposed that programmed instructional material be presented, assessed, and provided feedback in small steps. This formed the basis of instructional design because it allowed for the identification and analysis of remediation and weaknesses in the instructional process.

Reiser (2001b) explained that the popularization of the behavioral objectives came on the hands of Robert Mager who wrote his popular book on preparing objectives

with three proposed criteria that are still used by many. Later when Benjamin Bloom and his colleagues published their book on the different cognitive domains within which learners can accomplish learning they clarified that objectives can be explained according to these learner behaviors (Reiser, 2001b).

The term *criterion-referenced testing* was first used by Robert Glaser (1963; R. Glaser & Klaus, 1962) to indicate a different trend in assessing learners' performance. Opposite to the current norm-referenced testing where learners were assessed in reference to how they performed relative to others in their learning group, criterion-referenced testing evaluated learners' performance on mastery of content irrespective of how others in their learning group performed. Using this kind of assessment allowed for instructional programs to be designed to address learners' needs as indicated by an assessment of their entry-level behavior (R. Glaser, 1963; Reiser, 2001b).

The five domains or types of learning that were introduced by Robert Gagné in 1965 played an important role in shaping the history of instructional design (Reiser, 2001b). These domains were verbal information, intellectual skills, psychomotor skills, attitudes, and cognitive strategies, and each required a different set of instructional condition for learning to happen in each domain (Reiser, 2001b). Moreover, Gagné introduced the notion of hierarchical analysis, which implied that for certain intellectual skills to be acquired, subordinate skills need to be acquired first. This concept paved the way for learning to be organized in such a way that subordinate skills are learned before superordinate ones are.

The launch of Sputnik by the Soviet Union and the success of this effort sparked interest in producing effective math and science instructional material. When the first

attempts at producing such effective math and science material failed, Scriven (1967) introduced the idea of formative analysis to test material effectiveness while still in the preproduction stage. This analysis was later contrasted with summative analysis, which focused on evaluating instructional material after it was produced and used.

The early to mid-1960s witnessed the rise of early instructional design models as a result of using newly developed instructional concepts including task analysis, objective specification, and criterion-referenced testing. These models were first created by Gagné, Glaser, and Silvern (Reiser, 2001b). These individuals described the models they created using such terms as instructional design, system development, systematic instruction, and instructional system (Reiser, 2001b).

Reiser (2001b) described how the 1970s witnessed a prolific production of instructional models. Some of these models were adopted by the military and others by academia, both aiming to improve the instructional practices and use of instructional media. Moreover, many industries found value in using instructional design models to improve the quality of training they produce. Furthermore, internationally, many nations found value in using instructional models to further their instructional practices and contributed to the development of instructional programs and created organizations to further the use and development of instructional design.

In the 1980s, Reiser (2001b) indicated that interest in instructional design continued to grow strong in the military, business, industry, and internationally, but it gained little attention in public schools and higher education. While there was growing interest in how cognitive psychology ideologies could be applied in instructional design, several publications indicated that the actual effect was small (Reiser, 2001b).

Alternatively, microcomputers had a major effect on instructional design during this period. Many professionals in the field dedicated their attention to developing computer-based instruction while many others worked developing new instructional design models and automating some instructional design tasks. It was also during the 1980s when the performance technology movement started, only to proliferate during the 1990s (Reiser, 2001b).

Finally, performance technology that started in the 1980s gained a lot of attention during the next decade and expanded the field of instructional design to include more emphasis on deeper analyses of the causes of performance problems. Furthermore, the advent of constructivism changed what learning and instruction required learners to do such as solving complex and realistic problems, solving problems collaboratively, taking a multiperspective approach to problem-solving, taking ownership in learning, and becoming aware of their role in the knowledge construction process (Driscoll, 2000; Reiser, 2001b). One of the most exciting systems that rapidly grew during the 1990s was electronic performance support systems. These computer-based systems are designed just like job aids, to provide workers with the help they need to perform certain job tasks in a timely manner and in a format that is most useful.

One recent trend that affected instructional design during this period of the new millennial forward is rapid prototyping, which, as the name suggests, aims to produce multiple prototype products until the desired one is produced (Liedtka, 2018; Wengroff, 2017). The goal here was producing quality instructional material in a shorter period of time rather than going through the entire production cycle. And with the rapid growth of the internet during this period, there has been similar interest in delivering learning at a

distance via the internet knowing that just moving instructional material from the classroom to online would not be sufficient to effective learning. Thus, growing attention has been dedicated to instructional design practices and processes in this area. Similarly, the growth of knowledge management systems during the 1990s was triggered by the growing body of information of knowledge and the need to have immediate access to it across the organization. This trend was behind some organizations moving away from producing training material to creating knowledge management systems, thus altering some of the tasks that instructional designers do within their functions (Allen & Seaman, 2011).

Currently, instructional design benefits from the plethora of adult learning theories, instructional design models, and instructional media that have expanded from the physical to the virtually imposed and everything in between (Ertmer & Newby, 2013; Ghiciuc, n.d.). During the last 2 decades, the field has experimented with virtual learning and the opportunities for multimedia interactivity beyond the imagination. And while examples of such advanced 3D and 4D experiences have not yet found solid ground in educational institutions, they have narrowly found some opportunities in corporate learning and in e-commerce (Ghiciuc, n.d.).

Application. While the early attempts at instructional design centered on the creation of training material for the military and industry, management interest in these trainings was justified as a low-cost way to deliver learning (Hawkrige, 2002; Reiser, 2001a). Thus, the interest of both the military and academia in the role of instructional design in organizing learning systems and processes propelled the field to center-stage

significance. This gave the field some momentum in the right direction and encouraged the development of newer forms of instructional media.

In the United States in the early 20th century, Reiser (2001a) identified nine major movements that influenced instructional design in what is known today to be instructional media and technology, which comprise the core of the field of instructional design. First, the instructional process comprised the traditional triad of teacher, chalkboard, and textbook in addition to instructional media, which included any physical means by which instruction was presented to learners (Reiser & Gagné, 1983; Saettler, 1990). While attempts have been made to restructure the prevalent source of authority among the teacher, textbook, and instructional media, until recently, the predominant views on role of the teacher as the sole authority in the instructional process remains the same. The role of instructional media, and increasingly, instructional media technologies remain central to learning as well.

Another historical event to instructional design in America included the establishment of school museums through which visual media was administered as part of instructional media. These visual media included, as Saettler (1968) has indicated, “the distribution of portable museum exhibits, stereographs [three-dimensional photographs], slides, films, study prints, charts, and other instructional materials” (as cited in Reiser, 2001a, p. 89). Third, the visual instruction movement and instructional films, which were an extension of school museums but provided instructional guides to teachers to use the variety of visual media including magic lanterns, stereograph viewers, and motion picture viewers with the first catalogue of instructional films were published in 1910 (Reiser, 2001a).

Fourth, the audiovisual movement and instructional radio ushered in the use of audiovisual instructional media including radio, recordings, and audiovisual film during the 1920s and 1930s. But despite the big dreams for the instructional radio to bring about sweeping change, many factors including the technology itself and teacher resistance undermined the value of this promise. Next, World War II created a learning problem for personnel who needed to be trained quickly on a variety of topics instrumental to their survival (Olsen & Bass, 1982; Saettler, 1968, Shrock, 1995). The military resorted to creating a variety of training films, silent filmstrips, still photographs, audio recordings, transparencies, slides, and instructor manuals. By the onset of World War II, the use of audiovisual technology, which slowed in schools, continued to be used in the military, which produced 400 training films and 600 filmstrips over 4 million showings of training films to U.S. military personnel in the 2-year period between 1943 and 1945.

Sixth, theories of communication brought a different level of attention to the communication process and emphasized the significance of the communication medium (Berlo, 1963; Dale, 1953; Finn, 1954). This shift of focus to the message over mediums resulted in expanding the audiovisual movement. Seventh, instructional television also witnessed an expanded viewership and use for two major reasons. First the Federal Communication Commission dedicated 242 channels for education purposes, which resulted in growth of public instructional programming that was a quick, efficient, and inexpensive way to satisfy the people's educational needs. The second contributor to growth in instructional TV came from funding from the Ford Foundation, which resulted in a short-lived and minimal impact (Reiser, 2001a). Eighth, after the audiovisual media faded, there was a growing interest in the computers for instructional purposes

movement, which was pioneered by IBM developing the first computer-assisted instruction (CAI) program and language in the 1950s. By the 1980s and with the advent of the personal computer, an increased interest in computers for education brought computers for instructional purposes to more than 40% of elementary schools and more than 75% secondary schools.

While the promise was initially great, the reality is that the impact was far from impressive. However, by the onset of the 21st century, the utility and impact of the personal computer started to create momentum in education, which leads to the final and current movement in the field of instructional media and technology across all fields of higher education, K-12, business and industry, and the military (Reiser, 2001a). With online instruction in all fields growing decade after decade and year after year, it was no surprise that COVID-19 accelerated that growth with unknown future implications.

Origins of instructional design in e-learning. With the introduction of computers for education and training in educational systems, business, and the military, there has been huge growth in online and distance learning delivery. Additionally, the increase in availability of computers in K-12 education even prior to the pandemic has grown from 63% in 1999 to almost 93% in 2009 (King, South, & Stevens, 2017). This growth, which started with courses and programs delivered online, prompted engagement in the field of instructional design after the realization that simply converting what is being delivered in a traditional face-to-face environment to an online medium does not replicate the experience and thoughtful design initiatives needed. Even in the aftermath of COVID-19, and despite the immediate need for overnight switch to online delivery, there is deep understanding of the value of instructional design contributions to online

learning or e-learning (Alqahtani & Rajkhan, 2020; Decherney & Levander, 2020). This is evident in the enormous instructional design current year-to-year job growth and the projected job growth within the next decade (U.S. Bureau of Labor Statistics, 2019). This growth is also reflective of a paradigm shift from an emphasis on skill development and knowledge acquisition to an emphasis on meaning and knowledge construction and the importance of the learner experience (Derouin, Fritzsche, & Salas, 2005). Currently, the field of instructional design is influenced by such technologies as social media, cloud computing, and big data.

Online learning first appeared in the early 1980s in distance learning programs delivered through computer conferencing. From there, online learning witnessed continual growth until the term e-learning was coined by educational technology expert Elliott Masie in 1999 (Growth Engineering, 2020).

Instructional design and e-learning in corporate organizations. E-learning is the strategy of delivering learning through web-based, computer-based, and virtual learning (Derouin et al., 2005). Welsh, Wanberg, Brown, and Simmering (2003) found that e-learning is a learning movement in organizations, which is being deployed faster than research can keep up with. E-learning is popular in organizations because it allows them to deploy learning to all employees consistently and reliably. It is also easier to keep up to date and engage learners anywhere, anytime conveniently and cheaply (Derouin et al., 2005). Knowledge workers and their management look to talent developers not only to address the learning needs at the time of this study, but also to recognize future industry trends and opportunities, and prepare talent accordingly (Spar et al., 2018). In their new and evolving roles, knowledge workers are the experts of their

domains, the owners of their dynamic knowledge and skills, and they are continually engaged in developing their problem-solving skills, which requires both divergent and convergent thinking (Drucker, 2007). This crucial imperative of lifelong adult learning has become integral to organizational well-being and sustainability, on the one hand, and to the individual growth, advancement, and long-term employment, on the other hand (Beer & Nohria, 2000; Carnall, 1999; Higgs & Rowland, 2001; Kotter, 1994; Senge et al., 1999).

With change looming in every direction—whether environmental, technological, or financial—organizations need to continuously change to survive, let alone to compete, and learning and development departments have to lead the way in terms of risk assessment and future planning as well as preparing the different organizational teams for change that is either impending or unknown. This constant need for learning coupled with relentless change in learners' attitudes toward learning pose challenges to the field of instructional design and the practitioners in the field (Cox & Osguthorpe, 2003; Gibbons, 2003; Gibby, Quiros, Demps, & Liu, 2002; Rowland, 1992; Schwier, Hill, Wager, & Spector, 2006; Sharif & Cho, 2015). While there is a lot of literature on what instructional design involves and the need for instructional designers, there is limited literature on what instructional designers need to do currently to adequately address those needs (Sharif & Cho, 2015).

Creating a team culture through collaborative leadership and innovation.

Organizations big and small strive to compete as challenges continue to arise in a variety of foundational business aspects from cultural movements to technological innovations and economic trends (Drucker, 2007; Friedman & Mandelbaum, 2012; Watson, 2018).

Market dominance requires adaptability, innovation, and long-term business planning and intelligence. Industry leaders must work hard every day to reaffirm market loyalty and to deliver new and improved products, services with improved efficiency, and cutting-edge performance. Just to survive, organizations must constantly and creatively adapt (Pisano, 2015). To dominate, they must relentlessly innovate. Incremental, reactive response to change can help turn challenges into advantages, but it exerts tremendous amounts of pressure and stress on everyone in the organization. With change persistently coming from every direction, those who can successfully adapt once will soon be too overwhelmed to succeed in face of the sea of change coming at remarkable pace.

Change is difficult and requires agility, commitment, and insight. To continually innovate, organizations must establish a learning culture that empowers individuals across the organization to ask questions, take risks, experiment, and appreciate failures as learning opportunities (T. Brown & Katz, 2011; Liedtka, 2018; Pisano, 2015). This requires learning leaders who can inspire their team and the organization to innovate, push the limits, provide much needed value, and accomplish extraordinarily. They can do so by being innovative themselves and by motivating their teams to provide value by pursuing the difficult questions within an established environment of engagement and trust, psychologically safe connections, maximized potential, and appreciation.

The information age challenges businesses of all configurations to keep up with the volume and the speed at which change is happening. The role of instructional designers is to structure learning in meaningful and effective ways relative to learners' needs. It is the responsibility of learning and development leadership to ensure quality, competitive and engaging learning design, and to support their teams in their roles (Bond

& Dirkin, 2018). While the qualities of instructional designers and their leadership overlap, the need for effective leadership has developed because of the complexity of the field as the demand for quality learning expanded (Sharif & Cho, 2015).

Creating a team culture through the principles of heart-led leadership.

Expert instructional designers are creative thinkers and problem solvers with a firm interest in learning and skills in technology, education, and training. To effectively move their organizations through change both technologically and culturally, leaders in general, and learning and development leaders specifically, work with teams where every individual is, in many ways, a leader (Bond & Dirkin, 2018). More than ever before, the role and contributions of instructional design teams are becoming indispensable as they are change agents who craft learning solutions to satisfy current organizational needs to keep their organizations competitive and upskill knowledge workers for future trends to be leading-edge innovators (Shaw, 2012). However, to push the vision of the organization, learning and development leaders need to demonstrate commitment to a collaborative culture with the common goal of offering learners an exceptional, future-focused learning experience (Ashbaugh & Piña, 2014; Gardner et al., 2018; Shaw, 2012).

Effective teams learn to be engaged and connected to their leaders and each member of their team (Gebauer et al., 2008). Without collaboration and engagement, team efforts fall behind and may fail. The team not only depends on the individual potential of each member but also on the collective efforts and potential of the team working collaboratively (Gebauer et al., 2008). Furthermore, leaders who celebrate their team members' success benefit from a team who is willing to experiment and take risks to achieve maximum result (Crowley, 2011).

The Essential Role of Learning and Development Leaders in Corporate Organizations

As artificial intelligence and automation continue to take their rightful place in America's organizations, the gap between employees' skills and the skills needed by organizations continue to grow wider, deeper, and more significant (Davies et al., 2019). Davies et al. (2019) argued that terms such as *lifelong employability* are what organizations need to appeal to learners of all demographics and levels of education across the organization. What lifelong employability means is lifelong learning, continual upskilling, and reskilling, not as an episodic response to events but as an imperative learning strategy for the organization (Davies et al., 2019).

Learning and development leaders carry out the important task of developing their organization's learning strategy. They align with the business strategy and build the structure to develop and align the talent capabilities within the time and cost imperatives and ensure that learning efforts reflect and expand the organization's culture by inspiring employees to live the organization's values (Brassey et al., 2019). In these times, when knowledge is rapidly depreciating and knowledge shelf-life is short, this negatively affects employees' abilities to perform. The result is usually and clearly a deteriorated organizational ability to stay up to date and sustainable.

Learning and development leaders invest in building people's capabilities so that organizations can continue to compete and outperform (Brassey et al., 2019). For that, they assess learning gaps and build learning solutions that bring value and that can be effectively executed and scaled. To be agile and effective, Brassey et al. (2019) explained that learning and development leaders build partnerships with human resources

and other leadership across the organization with the shared responsibility for describing, highlighting, designing, and funding responsive initiatives quickly and successfully.

Learning and development leaders nurture innovation not only across their teams but also across the entire organization by developing learning journeys using principles such as those of agile, lean, and design thinking (Liedtka, 2018; Michaelis & Markham, 2017). However, not all learning and development leaders nurture innovation, the majority still focus on supporting innovation. Pisano (2015) explained that companies that persistently innovate adopt an innovation strategy. It is partly the role of learning and development leaders and requires top leaders' commitment to a full set of innovation learning policies with alignment across all functions of the organization. These policies are characterized by continual experimentation, learning from failure, and adaptation (Liedtka, 2018; Pisano, 2015).

Finally, learning and development leaders develop the systems to measure the effectiveness of learning initiatives in addressing the organization's key performance indicators such as alignment of learning and development to the business priorities and investment, effectiveness in changing people's behaviors and performance, and determining how well the resources are used with respect to their goals and deliverables (Brassey et al., 2019).

Summary

Learning and development leadership is crucial to establishing, cultivating, and leveraging a culture of high performance, engagement, appreciation, and furthering employee potential. This study specifically addresses the role of exemplary learning and development leaders as they and their teams engage in their roles at the creative, risk-

taking, and innovative levels. This requires a level of engagement and empowerment from leadership that can advance not only the team of learning designers but also leverages the organization's strategic and competitive advantage in an ever-shifting technological, informational, political, and environmental landscape. Crowley's (2011) four principles of heart-led leadership of building a highly engaged team, connecting personally, maximizing employee potential, and valuing and honoring achievement positively influence leaders in organizations. When productivity is in high demand, employees need to be engaged with their work, their leaders, and the organization (Gebauer et al., 2008; Groysberg & Slind, 2012). This can happen through building an emotional connection between the team member and their leaders and the organization. Also when leaders mentor, coach, and support their team members to grow and develop their knowledge and skills, they inspire them to grow in their roles and in the organizations (Gebauer et al., 2008). Additionally, leaders who show appreciation for their staff, influence their team members' appreciation for work that is meaningful and fulfilling (Kouzes & Posner, 2006). Crowley's (2011) four principles of leading from the heart create an environment of trust and engagement that is conducive to commitment to high achievement. Leaders serving as people leaders recognize how challenging it is to be in a service role to their staff, the organization leadership, and their customers and stakeholders (Bridgman, 2021). As such, as they continue to explore ways to achieve extraordinary results for their organization, learning and development leaders must find ways to lead from the heart.

This chapter offered a review of the literature pertinent and significant to this study. A synthesis matrix (Appendix A) was created to help in forming this review of

literature. The matrix was developed to support the researcher in structuring the references by topic and theme. As the researcher viewed the literature relevant to the study, she utilized the synthesis matrix as a tool to identify relationships between sources and make extrapolations about the relationship between them.

CHAPTER III: METHODOLOGY

Overview

Choosing a methodology to investigate the purpose and research questions of a study must support the critical standards of educational research (McMillan & Schumacher, 2010). This chapter presents these six elements in accordance with this study's methodology, which includes a purpose statement and research questions, followed by the qualitative research design and theoretical framework. Next, the population is identified, and then the population sample selection process is explained. The instrumentation section describes the process of developing data collection instruments and data analysis approaches, followed by the study's limitations. Finally, a closing summary captures the main ideas presented in this chapter.

Choosing a phenomenological research model as the research design for this study was aligned with the purpose of the study. The study describes the lived experiences of learning and development leaders in technology companies in California who led their team to achieve extraordinary results by implementing Crowley's (2011) four heart-led principles. A phenomenological research study is most appropriate research design for this study because it helps the leaders share their stories at depth.

Throughout the study, the term *peer researchers* was used to refer to the 12 UMass Global University doctoral students who operated under the guidance of five faculty chairs, collaborating on the design and implementation of this thematic study.

Purpose Statement

The purpose of this phenomenological study was to describe how exemplary learning and development leaders in technology companies lead from the heart using

Mark Crowley's (2011) four principles (building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements) to accomplish extraordinary results in their organizations.

Research Questions

Central Question

How do exemplary learning and development leaders in technology companies in California use Mark Crowley's (2011) heart-led principles of building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements to lead their teams to accomplish extraordinary results?

Subquestions

1. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by building a highly engaged team?
2. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by connecting on a personal level?
3. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by maximizing employee potential?
4. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by valuing and honoring achievements?

Research Design and Methods

A research design is a process for gathering, studying, rendering, and conveying data in a research study (Creswell & Plano Clark, 2017). It is the overall strategy used to carry out a research project, whereas the research methods are the different processes, procedures, and tools used to collect and analyze data (Creswell, 2007; De Vaus, 2001).

There are two primary research designs: qualitative and quantitative. Qualitative designs have many forms in different “social and humanities disciplines (Daiute & Lightfoot, 2004, Patton, 2002)” Creswell et al., 2007b, p. 240). The major designs included in qualitative designs are case study, phenomenological, ethnographic, heuristic, and grounded theory studies. The design selected for this study was a qualitative phenomenological study. It provided a systemic subjective approach to describe the lived experiences of learning and development leaders that gave them meaning and allowed the researcher to gain insight, richness, and complexity inherent in the phenomenon. The research design works to explore the reflective shared meaning of the lived experiences of those sharing a phenomenon the way they “perceive it, describe it, feel about it, judge it, remember it, make sense of it, and talk about it with others” (Patton, 2015, p. 115).

This qualitative research method pursues a deep examination of the research setting to understand how things are and how the research participants make sense of and understand them (Gay, Mills, & Airasian, 2006). In other words, qualitative research serves to survey the human experiences as they are internalized by the research participants who make meaning of their experiences the way they construct and adopt them. The researcher, thus, extracts and describes these experiences by eliciting answers to the how and what of these retrospections. McMillan and Schumacher (2010) explicated that research design describes how the research was conducted, how the data were collected and identified, and the research subjects’ role. They further identified seven key characteristics to qualitative research, natural setting, context-sensitivity, direct data collection, rich narrative description, process orientation, inductive data analysis,

participant perspectives, emergent design, and complexity of understanding an explanation (McMillan & Schumacher, 2010).

This qualitative research study described how exemplary learning and development leaders in technology companies lead from the heart using Mark Crowley's (2011) four principles to lead their teams to achieve extraordinary results utilizing a phenomenological inquiry approach. A qualitative phenomenological approach was useful and appropriate to this study because it enabled the researcher to explore how leaders explained those experiences that fell within the realms of their consciousness, thus they could reflect on them, describe them, or analyze them (Patton, 2015). Through in-depth lived experiences, interviews, and examination of artifacts, the researcher gained insight into how the phenomenon was lived and described from the participants' perception and then acquired meaning within their consciousness before being conveyed through a detailed reflective narrative (McMillan & Schumacher, 2010). Semistructured open-ended interview questions focused on Crowley's (2011) four leading from the heart principles, which centered on building a highly engaged team, connecting personally, maximizing employee potential, and rewarding and honoring achievement. The interview questions on trust, authenticity, humility, vulnerability, achievement, and reward helped participants share the stories collected in their consciousness, whether "real or imagined, empirically measurable or personally felt" (Patton, 2015, p. 115) because they are of high value to the researcher.

For this research study, eight interviews were scheduled and conducted with exemplary learning and development leaders from six technology companies in California. These are the companies from which the participants were nominated and

who actually participated in the study. All of the interviews were conducted virtually using video conferencing technology. After responses to interview questions and other data sources such as artifacts were coded, they were then organized into themes. Next, the themes were analyzed to extract exemplary learning and development leaders' shared meaning related to the phenomenon of leading from the heart that was presented as a narrative with direct demonstrative quotes. Conducting interviews allowed the researcher to extract the most in-depth, extensive meaning to construct that narrative of the lived experiences because of the opportunities for follow-up with interpretive queries to help participants explicate more meaningful narratives specific to them.

Population

Creswell (2003) stated in the publication *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches* that a population is “a group of individuals who comprise the same characteristics” (p. 644). Similarly, a population is defined as a collection of individuals or objects within a particular group known to have common characteristics or traits (Creswell & Plano Clark, 2011). McMillan and Schumacher (2010) maintained that a population in research is a group that corresponds to a specific set of criteria to which the researcher intends to generalize the research results. The larger population for this study was a group of learning and development leaders from which data were collected and is characteristic of the sample chosen. This information allowed the researcher to arrive at conclusions concerning the population sample (Patten & Newhart, 2018).

The population considered in this research study is estimated at 18,710 learning and development managers in the United States and 5,180 learning and development

leaders in California according to the U.S. Bureau of Labor Statistics for May 2019. Learning and development leaders are tasked with identifying learning gaps and unanticipated future needs among an organization's teams and individuals and developing the strategies and learning plans necessary to bridge these gaps and align employees' goals and performance with those of the organization (Ashbaugh, 2013). Together with their teams of learning designers, leaders are responsible for attracting and retaining talent and creating a value-based culture of engagement and motivation through developing programs that ensure that the organization is constantly evolving and developing (Brassey et al., 2019).

Sampling Frame/Target Population

A target population for a study is the entire set of individuals chosen from the overall population for which the study data are to be used to make implications and conclusions. The target population defines the population to which the findings are meant to be generalized. It is vital that target populations are clearly identified for research study purposes (McMillan & Schumacher, 2010). Because of time or cost constraints, it is typically not feasible to study large groups; therefore, the researcher chose population *samples* from within a larger group. Findings from the research study were intended to be generalized to represent the specific population; therefore, it was important to clearly identify the target populations in a study (McMillan & Schumacher, 2010).

The target population for this study was narrowed to the estimated 430 learning and development leaders in technology companies, publicly traded companies on the NASDAQ in California based on conversations with learning and development leaders

from Facebook, Amazon, and Qualcomm. This estimate was reached by considering the top 30 in number of employees technology companies with four or six learning and development leaders each and two to three leaders within each team. This number comes to about 430 learning and development leaders in these companies throughout California. Therefore, the researcher identified a population sample from within a larger group to study for this research (see Figure 5 for the population, target population, and sample).

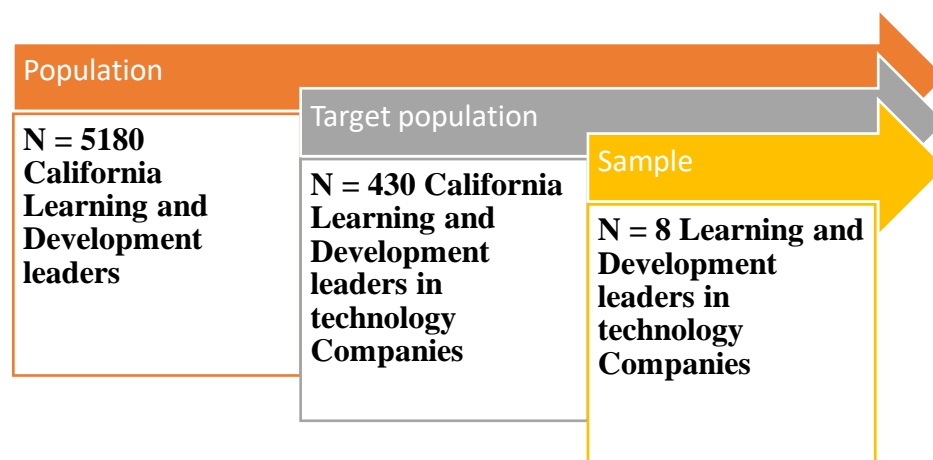


Figure 5. Population, target population, and sample.

Sample

The group of subjects who participate in a study and become the data source for the research are referred to as the sample population (Creswell, 2008; McMillan & Schumacher, 2010; Patten, 2012). McMillan and Schumacher (2010) maintained that sampling is selecting a “group of individuals from whom data are collected” (p. 129). Similarly, Patton (2015) and Creswell (2003) defined a sample as a subgroup of the target population representing the whole population. When a researcher chooses a quantitative approach, the sample is often random; however, the sample population for this qualitative study was purposeful and criterion-based. According to McMillan and Schumacher

(2010), purposeful sampling is when the researcher “selects a sample that is representative of the population or that includes subjects with needed characteristics” (p. 138). Purposeful sampling was chosen as the method of sample selection based on the criteria establishing exemplary leaders.

In this research study, a nonprobability, purposeful sampling of learning and development leaders in technology companies in California was selected as the sample population. This was the correct sampling method for this study because it enabled the researcher to select participants from a well-defined population with attributes commensurate with the research topic, thus capable of casting light on their experiences related to exemplary leading from the heart behaviors to achieve extraordinary results.

Qualitative analyses typically require a smaller sample size than quantitative analyses (Creswell, 2007). Qualitative sample sizes should be large enough to obtain feedback for most or all experiences and views. The purpose of obtaining most or all of the perceptions is to attain saturation. Saturation occurs when adding more participants to the study does not result in additional perspectives or information. B. Glaser and Strauss (1967) recommended the concept of saturation for achieving an appropriate sample size in qualitative studies.

Furthermore, for phenomenological studies, Creswell (1998) recommended five to 25 participants, and Morse (1994) suggested at least six. And while there are no specific rules when determining appropriate sample size in qualitative research, the qualitative sample size may best be determined by the time required, available resources, and study objectives (Patton, 1990). For purposes of this study, the peer researchers together with faculty advisors arrived at a sample size of eight.

The criteria used for this study included eight exemplary learning and development leaders in technology companies in California who demonstrates at least four of the following criteria; the first two are required:

1. Evidence of caring for people in the organization
2. A minimum of 3 years' experience as a charter school executive director
3. Evidence of extraordinary results
4. Articles, papers, or materials written, published, or presented at conferences of association meetings
5. Recognition by peers
6. Membership in a professional association in their field

Selection of Sample Study Participants

In the search for nominees for the sample participants, the researcher sought the support of a panel of expert advisors from the field. Expert advisor panels are often used to identify research participants who must meet certain criteria for inclusion in the study. An expert panel member is a person with extensive knowledge and experience in a particular occupation or area of study. Panel members are called on to provide expert advice in their area of expertise (Creswell, 2003). The researcher enlisted the support of an expert panel to identify potential participants in this study who met the study criteria. The panel included three experts with extensive experience and knowledge in the field of technology and corporate learning and development. The purpose of the panel was to identify potential leaders of learning and development to participate in the research by nominating leaders who met the two required criteria and two of the four elective criteria for being exemplary. Panel members were familiar with the work of the identified

leaders in the target population. Each panel member was asked to nominate a maximum of five leaders who met two of the four elective criteria for being an exemplary learning and development leader. Leaders who received one or more nominations were invited to participate in the study.

Sample Selection Process

The sample process of participants for this research study began with identifying expert panels familiar with California technology corporations and learning and development leaders. Panel members were to nominate five possible participants based on exemplary criteria and their knowledge of learning and development leaders in technology companies. The panel included the following:

1. Dr. Leo Ulloa
2. Dr. Sharon Floyd
3. Dr. Khaled El-Maleh

Each individual has developed, managed, and strategically planned the structure of their technology-based organizations and networked with various leaders in technology companies in California. Dr. Ulloa has been the STEAM Programs Coordinator for Sweetwater Union High School District, a member of the board of directors of EastLake Education Foundation, a board member of South County Economic Development Council, and a board member of other South County organizations. Dr. Floyd has over 14 years of experience as a learning and development leader in different organizations and is involved with numerous organizations, including the International Organization of Standardization as a voting member and registered technical expert in employee engagement and associate dean and professor at the School of Business Administration at

UMass Global university. Dr. El-Maleh is the intellectual property lead of Artificial Intelligence and Machine Learning at Qualcomm. He is a board member of National University College of Professional Studies, an advisory board member of the California School of Management Leadership at Alliant University. Moreover, he served as an executive advisory board member of the University of San Diego Shiley-Marcos School of Engineering. The following steps were taken to determine the selection of participants for the study.

1. The expert panel provided a list of nominations; those nominated more than once were placed on a list of potential participants.
2. The researcher then checked social media, websites, and professional sources to validate that the participants met the criteria.
3. The researcher reviewed the list of potential participants to the expert panel for review and verification that participants met the study criteria.
4. Once the panel agreed on the study participant pool of candidates meeting the criteria, the researcher contacted each nominee by email or LinkedIn messaging and shared with them the interview guide.
5. Candidates were then contacted by telephone at their office to seek involvement in the research study (Appendix B: Introduction Letter – Leaders).
6. During the phone conversation, the purpose and benefits of the study were discussed. Possible risks, privacy with involvement, and questions were answered during the initial phone conversation.

7. If more than eight participants were available and willing to participate, the researcher selected the first eight participants to schedule their interviews (Appendix C: Interview Guide).
8. After the potential candidate agreed to their participation, participants received the informed consent form (Appendix D: Informed Consent Form).
9. Interview appointments were scheduled for 45 to 60 min through Zoom based on the participant's schedule.
10. The participant was then provided the following communication: invitation letter (Appendix B), interview guide (Appendix C), Informed Consent and Audio Recording Release (Appendix D), and UMass Global Research Participant's Bill of Rights (Appendix E).
11. Interviews were recorded digitally (Appendix F: Audio release) by the researcher and transcribed. The interview included a verbal confirmation of consent, which was included in the Zoom recording and transcript for verification.

Instrumentation

According to McMillan and Schumacher (2010), qualitative data are collected in various ways such as interviews, observations, focus groups, or other methods of data collection that are more extensive than for quantitative data. Instrumentation is critical in a qualitative study. A qualitative study involves practice writing open-ended questions and training (Chenail, 2011). McMillan and Schumacher (2010) stated, "A phenomenological interview is a specific type of in-depth interview used to study the meanings or essence of a lived experience among selected participants" (p. 352). The researcher served as the instrument for interviews, and the artifacts' analysis, which may

have threatened the study's validity and formulated bias (Chenail, 2011). Patten and Newhart (2018) stated that it is essential for an interviewer to maintain neutrality when questioning wording since it may affect the interview session referred to or self-disclosure. When conducting a qualitative research study, the researcher is an instrument in the process. The researcher's personality, characteristics, and conducting interviews may influence data collection (McMillan & Schumacher, 2010). For this research study, the researcher had been an instructional designer and learning and development leader who had worked on projects in higher education and corporate organizations and on learning and development assignments for over 14 years. Therefore, the researcher may have carried some bias stemming from her personal experience as a recipient and provider of the leadership practices explored in this research (Poggenpoel & Myburgh, 2003).

The researcher conducted a qualitative semistructured open-ended interview with the research participants. The interview questions and responses were conducted via video conferencing and recorded digitally using cloud recording. The peer researchers in the thematic study collaborated with faculty members and developed interview questions and protocol for the study using the following steps:

1. The peer researchers and faculty members identified Mark Crowley's (2011) four principles.
2. They divided the four principles among four research teams, each with three to four doctoral candidate team members.

3. Each research team member defined the principle using research from seminal authors. The thematic team met numerous times until there was agreement on the definitions.
4. The next step was for each research team member to identify the subvariables within each definition using research from seminal authors.
5. Research team members convened, reviewed, revised, and finally agreed upon final subvariables within the definitions.
6. Team members then used the concept papers centered on the definition of one of the Crowley (2011) principles to develop an operational definition for each term or phrase discussed in the theoretical definition.
7. Each team member wrote a concept paper for each subdefinition and came up with three questions and a probe to each question based on these definitions in the concept papers.
8. Each research team member then drafted interview questions from each definition of principles using the subvariables as a content guide.
9. The team convened, reviewed, revised, and agreed upon final interview questions and probes aligned with research questions and definitions.
10. Following the adoption of the interview questions and probes, an interview protocol was established by the research chairs and researchers in an effort to further control and standardize the interview process.
11. Following review by the faculty chairs, team members drafted a script for the interview process.

The team finalized 12 open-ended questions with three questions for each of Mark Crowley's (2011) four principles (building an engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements). The questions were based on the review of the literature and Mark Crowley's four heart-led principles. The thematic research team met to do a final review and agreed on the final version of the interview instrument and script.

Field-Testing of Interview Questions

Interview Questions

In this qualitative phenomenological research design, semistructured open-ended interviews were conducted. Patten and Newhart (2018) stated that semistructured interviews are popular because interview questions are constructed beforehand, but interviewers may probe for further detail, unlike structured interviews. Semistructured interviews are open-ended questions, and probing is allowed (McMillan & Schumacher, 2010).

The researcher conducted interviews with learning and development leaders through Zoom. The transcripts were then provided to the participants to review accuracy to ensure that the learning and development leaders at technology companies were represented and quoted with accuracy and impartiality.

Field Testing

Hazzi and Maldaon (2015) posited that field testing is vital in conducting a research study. The definition of a pilot test is "a small-scale test of the methods and procedures to be used on a large scale" (Porta, 2008, p. 320). By conducting a field test, one reveals any logistical problems before conducting the main study, thus helping the

researcher modify the actual research (Hazzi & Maldaon, 2015). Before conducting the field test, an interview guide was also formulated in advance and tested during the field test.

An interview guide or interview protocol is created in advance to allow the interviewer to capture the descriptions from the learning and development leaders with the opportunity to dig deeper (Nelson & Slater, 2013). It may also help the interviewer restate questions if clarity of the question becomes an issue for the interviewee. The determined questions used to guide the conversation will offer an opportunity for the interviewee to describe in more depth their lived experiences (Patten & Newhart, 2018). The questions will help the researcher receive more detailed information of the support learning and development leaders had put in place to strengthen their role and overcome gaps in readiness.

Each member of the thematic team was tasked with conducting a pilot test with a participant who met the study criteria but was not included as a participant in the study. Each of the 12 interview questions and their probes, together with the additional general probes, when needed, were asked during an authentically conducted interview. The participant for the pilot test was chosen based on the study's criteria of an exemplary learning and development leader in a technology company. As a part of the field study, the researcher collected three forms of feedback to check the reliability and validity of the interview instrument. An independent expert observer of the test interview was asked to provide feedback using the observer's feedback reflection form (see Appendix G). The participant was asked to evaluate the interview process and content using field-test participant feedback form (see Appendix H). Finally, each researcher used an interview

feedback reflection form (see Appendix I) to conduct a self-assessment of the interview. The researcher gathered the data and presented them to the thematic team for further review. In addition, peer researchers discussed challenges and recommendations for improving the interview protocol. After careful examination, the ideas were presented to faculty research chairs, who reviewed, evaluated, and refined the interview protocol. The protocol and 12 questions (Appendix C) were distributed to the peer researchers, who then interviewed eight exemplary leaders in their field of study after attaining UMass Global university’s Institutional Review Board approval. The field test related to this study was conducted with an exemplary learning and development leader working for a technology company in California who met the two required criteria and two of the four additional criteria and whose data were not included in this study. The characteristics of the exemplary learning and development leader are provided in Table 1.

Table 1

Characteristics for Exemplary Learning and Development Leaders

Study participant	Evidence of caring for people in the organization	A minimum of 3-year experience as a Learning & development corporate leader	Evidence of extraordinary results	Articles, papers, or materials written, published, or presented at conferences association meetings	Recognition by peers	Membership in a professional association in their field
1	X	X	X	X	X	X
2	X	X	X	X	X	X
3	X	X	X	X	X	X
4	X	X	X	X	X	X
5	X	X	X	X	X	X
6	X	X	X	X	X	X
7	X	X	X	X	X	X
8	X	X	X	X	X	X

Validity

The validity of qualitative research refers to the degree to which the research study successfully accomplished what it set out to accomplish and whether the findings and conclusions made by the researcher demonstrate a truthful account of what was promised. This research study set different parameters to optimize validity, including multiple researchers, collaboration with the research faculty and researcher language, and an accurate account of collected experiences or analyzed information. To minimize misinterpretation of communication between participants and the researcher, the researcher used probe questions for each of the 12 approved questions with the potential to use an additional set of probing questions in case specific probes did not yield enough details. Several strategies enhanced the validity of this study to include the use of interviews and the analysis of artifacts to gather perspectives on the topic. This multiprong approach to data collection improved the triangulation of data to increase a study's integrity to enhance validity (McMillan & Schumacher, 2010).

Reliability

Golafshani (2003) affirmed that reliability meant the consistency of results rendered over time. In other words, it referred to the probability that the same results be obtained from the same research when replicated repeatedly with similar levels of accuracy. Golafshani recognized three aspects that impact reliability: instrument similarity within a specified period, strength and permanence of a measurement over time, and the degree to which a measurement was constant when repeated over time. Examining challenges discovered through the field-testing process enabled the researchers to refine instruments. Pilot testing by multiple researchers and subsequent

instrument refinement helped minimize instrumentation errors (Kimberlin & Winterstein, 2008).

Internal, External, and Intercoder Strategies

Internal, external, and intercoder strategies support increasing a study's reliability (Patton, 2015). Internal reliability of the data was established to reduce potential bias in data analysis. The thematic group of 14 peer researchers collaborated to create the interview protocol and interview instruments to discover the lived experiences of exemplary leaders concerning the four research elements. Uniformity in the process and instruments used by researchers reinforced the internal reliability of the study.

External reliability was not a concern for this study on exemplary learning and development leaders because of the limited generalizability of each leader's unique lived experience (McMillan & Schumacher, 2010). Quality qualitative research can generate understanding for the area being studied (Stenbacka, 2001). However, it was essential to learn from the individual experiences of exemplary learning and development leaders and then determine themes through the examination of data and the coding process for the study sample of exemplary learning and development leaders.

Intercoder reliability is the process by which coders standardize units of text and reduce coding errors, a process oftentimes used for semistructured interview transcripts to reach an acceptable level of agreement between coders (Campbell, Quincy, Osserman, & Pedersen, 2013). Standardizing the study's research protocol, interview questions, and the expectation for attaining intercoder reliability to a level of 80% agreement required a peer researcher from the thematic team to examine 10% of the coding and respective

themes for this study. Instruments in the study were specifically tested to increase internal, external, and intercoder reliability for consistency in results.

Data Collection

Patton (2015) posited that qualitative data reports include stories, observations, and artifacts used to portray and explain the experience under study. For this research study, data collection included conducting interviews and the study of artifacts for the eight exemplary learning and development leaders. Before beginning the interview process, the researcher obtained approval from UMass Global university's Institutional Review Board (IRB) after securing Collaborative Institutional Training Initiative (CITI) certification (Appendix J). The certification verified the researcher's understanding of how to protect human participants and maintain confidentiality to support the integrity of the research study. The researcher protected the confidentiality of participants by maintaining the identifying codes and research materials safeguarded in a locked file drawer and on a computer that was password protected to which the researcher had exclusive access. Transcripts and audio file recordings were available only to the researcher. All information was identifier-redacted to secure confidentiality.

Semistructured Open-Ended Interviews

The researcher enacted the following steps for the interview process:

1. Approval to conduct the study was obtained from the UMass Global university IRB.
2. A panel of expert advisors composed of recognized learning and development leaders in their organizations identified potential participants who met the criteria for exemplary learning and development leaders who worked in any of the technology companies in California.

3. Advisors introduced the researcher to potential participants via email or LinkedIn messaging.
4. The researcher contacted the exemplary learning and development leaders by email (Appendix G) or LinkedIn messaging (Appendix B) to request their participation in the research study.
5. Once the learning and development leader agreed to participate in the study, an interview was scheduled to include the virtual location, date, and time of the interview.
6. A follow-up email (Appendix C) was sent to participants with the researcher's contact information. Four documents were provided as attachments to the email for the participants' review, including the following:
 - a. The invitation to participate (Appendix B),
 - b. the interview questions (Appendix C),
 - c. request for artifacts form (Appendix ?),
 - d. the Informed Consent and Audio Recording Release (Appendix D), and the UMass Global University IRB Researcher Participant's Bill of Rights (Appendix E).
7. Upon reviewing the four documents and obtaining the necessary signatures, the researcher conducted interviews with participants.
8. Each interview began by reviewing the Informed Consent and Audio Recording Release and the UMass Global University IRB Research Participant's Bill of Rights and the privacy measures to ensure confidentiality of the information collected on and from the interviewees.

9. Interviews were recorded on a cloud-based system with both audio and visual recording.
10. The researcher followed the interview protocol for the semistructured interviews to ask 12 semistructured questions, sometimes including probes to seek clarification or to elicit additional details (Appendix C).
11. After each interview, the researcher thanked the participant, and the recordings were then stopped.
12. The researcher reiterated their request for any artifacts that would support verbal responses from the interview.
13. Participants were sent transcripts to verify for accuracy.

Artifacts

McMillan and Schumacher (2010) explained that artifacts are any kind of documentation, whether formal or informal, written by the participant or their followers used to describe the human experience, knowledge, behavior, and values. Data gathered often include such things as objects, including memorabilia, awards, created objects that demonstrated processes, design, thinking, meaning, or symbols. Other artifacts can come in the form of personal or official documents. Others came in the form of personal documents comprising letters, diaries, personal communication, and official documents included meeting minutes, performance evaluations, letters of awards, and speeches.

This study incorporated data extracted from artifacts when feasible, in addition to the drafted semistructured open-ended detailed interviews. Thorough analyses were conducted of artifacts such as documentation of experiences of the learning and development leaders, their teams, and others whose contribution helped highlight

important information from the field. Themes were obtained from all the interviews, and artifacts and the information acquired was synthesized to determine findings.

Data Analysis

According to McMillian and Schumacher (2010), “Qualitative analysis is a relatively systematic process of coding, categorizing, and interpreting data to provide explanations of a single phenomenon of interest” (p. 364). Such analysis aims to make meaning of the data by transforming it into knowledge that will be of value (Patton, 2015). As far as this study is concerned, the data produced came from the interviews and the analysis of artifacts. Because of the COVID-19 disruption and having to do the interviews virtually and suffice with the raw data from the interviews, no observations were carried out as part of this study. Therefore, triangulation was based on the interview data and the information elicited from the collected artifacts. Creswell (2003) recommended a three-prong approach to data analysis that comprises preparing and organizing the data, analyzing the data, and coding the data into themes.

Current technologies made it easy to obtain transcripts of recorded virtual meetings, with relatively good quality, together with the digital files of the video, audio, and text became available almost immediately as the interview process was completed. Still, transcripts were reviewed against the audio files for accuracy, and edits were made immediately. Next, transcripts from the interviews were entered into a web-based analytical software program called NVivo, where themes from data were generated together with information entered from artifact analysis, codes, and themes. And although qualitative software facilitated interaction with the data, the researcher performed content analysis and determined what information fit together to form patterns,

identify themes, and determine the meaning (Patton, 2015). Codes with greater frequency were considered or contributed to a theme. After the researcher coded transcripts from participants, a peer researcher from the UMass Global University Doctoral Program alumni also reviewed 10% of the coding data with an agreement of 80% to increase intercoder reliability. Lombard, Snyder-Duch, and Bracken (2002) conceived that intercoder reliability is the degree to which different coders ascribe the same themes to different codes. This is an essential aspect of qualitative research because it allows researchers to confidently make conclusions knowing that intercoder reliability is verified and supported. In this study, the data, codes and themes were represented within frequency tables. Then all data were analyzed and served as the basis for explaining behaviors that exemplary learning and development leaders experienced to lead in their organizations through heart-led principles. Together, the codes and themes offered an understanding of the lived experiences of technology companies' leaders of learning and development. Data analysis included the following:

1. Transcription of audio recordings
2. Review of data for possible emergent themes
3. Coding data using NVivo software
4. Categorizing codes into themes and creating frequency tables
5. Analysis of emergent themes that describe the lived experiences that exemplary corporate learning and development leaders' practice in leading with their heart
6. Analysis of data collected from artifacts

Limitations

Limitations are those qualities of a research study that negatively affect the results or the generalizability of the results to other similar populations (Creswell, 2008; Patton, 2015). In this research study, data collection and analysis decisions affected the findings of the study. Namely, participant location, sample size, location of interviews /observations, and the researcher as an instrument of the study were limitations in the study.

Interview Modality

This research study was limited to learning and development leaders in the largest 30 publicly traded technology organizations in California, where the eight participants came from an estimated pool of 430. The estimate was calculated on the basis that each of these companies had an average of four or six learning teams with about one or two learning development leaders in each team located in these companies. And while conducting virtual interviews added to the facilitation of meetings with leaders in various locations across the California coast from San Diego to the Bay Area, it was a networking limitation to Southern California that limited the number of participants to an inequitable number across the different regions.

Sample Size

Dworkin (2012) suggested that because qualitative studies focused on details of a lived experience rather than on generalizability, the sample size of such studies is usually relatively small. Eight exemplary learning and development leaders were identified to take part in the study. The leaders in focus were selected based on purposeful sampling and on their availability and willingness to participate in the research study and their

location in California. This would be a limitation of this study because this small sample size working within a limited geographical location has implications for the generalizability of the results.

Location of Interviews/Observations

COVID-19 and the continual virtual work status across the country and in many companies made conducting the interviews on-site at the leader's workplace challenging. Therefore, the interviews were conducted virtually via video conferencing technology. Naturally, virtual meeting technologies facilitated other aspects of data collection. However, the absence of face-to-face interaction may have negatively affected gathering more valuable data as far as body language during the interview itself. It also made it too difficult, even impossible, to conduct on-site observations. The lack of data from observations is a critical element of triangulation and therefore was a limitation for this research study.

Researcher as Study Instrument

Researchers are an important element of the research in qualitative research as they make considerations and decisions that can heavily impact the research outcomes. For that reason, Patton (2015) indicated that the researcher as an instrument of the qualitative inquiry that could threaten the internal validity of the study (McMillan & Schumacher, 2010). The researcher for this research study had been an instructional designer and learning/training and development leader who had worked on projects in both higher education and corporate organizations and on learning and development assignments for over 14 years, and as such may have carried some bias stemming from

her personal perceptions, experience, and judgment as a recipient and provider of the leadership practices explored in this research.

Summary

This phenomenological qualitative study has focused on the experiences of learning and development leaders in technology companies in California. Chapter III presented the methodology employed in this study. It aligned to the phenomenological qualitative research method to describe the behaviors that exemplary learning and development leaders experience as they lead their organizations and teams through Crowley's (2011) leading from the heart principles. The population and methodology to select the sample for the study were offered, and the instrument development, data collection methods, and approaches to data analysis were presented. Finally, limitations of the study were identified. Chapter IV addresses the process for data collection and identifies the research findings. Chapter V provides the concluding elements for the study and a summary of the research findings, conclusions, and recommendations for future studies.

CHAPTER IV: RESEARCH, DATA COLLECTION, AND FINDINGS

Overview

Chapter IV provides a summary of the purpose, research questions, methodology, data collection procedures, and population sample. Additionally, the demographic data of the corporate learning and development leaders who participated in the study are summarized. This chapter also synthesizes and reports the findings of the data collected as related to the research questions. The chapter closes with a brief summary of the findings.

Purpose Statement

The purpose of this phenomenological study was to describe how exemplary learning and development leaders in technology companies in California use Mark Crowley's (2011) heart-led principles of building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements to lead their teams to accomplish extraordinary results.

Research Questions

Central Question

How do exemplary learning and development leaders in technology companies in California use Mark Crowley's (2011) heart-led principles of building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements to lead their teams to accomplish extraordinary results?

Subquestions

1. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by building a highly engaged team?

2. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by connecting on a personal level?
3. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by maximizing employee potential?
4. How do exemplary learning and development leaders lead their teams to accomplish extraordinary results by valuing and honoring achievements?

Research Methods and Data Collection Procedures

The research method utilized a phenomenological qualitative inquiry method for this research study. It described the lived experiences of exemplary corporate learning and development leaders leading from the heart. Information collected through one-on-one interviews and artifacts portrayed the lived experiences of eight participants. Stories were collected and analyzed for themes according to each research question. A phenomenological approach was the appropriate approach for this study because it helped pursue a deeper understanding of the lived experiences of corporate learning and development leaders. Together with artifacts collected from the research participants, data collected from the interviews delivered rich stories of the participants' experiences and strategies used to lead from the heart.

This phenomenological research study comprised semistructured open-ended, one-on-one interviews through Zoom Video Communications with exemplary learning and development leaders from technology corporate organizations in California. Artifacts were obtained in addition to the interviews. The acquired artifacts consisted of Scrum meeting notes, emails, awards, excerpts from performance reviews, reward nominations, and so forth. The eight interviews were conducted through Zoom Video

Communications at scheduled at the participants' convenience. The primary source of the data collected for the research study came from the interviews while the artifacts were used as secondary sources of data to demonstrate consistency in the findings and evidence across the results.

The semistructured one-on-one protocol consisted of 12 questions with additional optional probes to provide opportunities for more reflective responses. Each of Crowley's four heart-led principles were investigated with three questions with supplementary probe questions as needed. Participants were provided a copy of the research questions and a definition of each of the four heart-led principles: building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements. The questions were created collaboratively by the peer researchers in the thematic study and with input from faculty members. Each interview lasted between 37 to 69 min, with an average of 53 min.

The eight interviews were collected, transcribed, and analyzed using NVivo systems. The researcher collected 19 artifacts that provided content aligned with Crowley's (2011) four heart-led principles leading from the heart. The artifacts collected included weekly Scrum meeting updates, well-being messages, email, awards, reward nominations, and performance review commentary. As a method of triangulation, the artifacts were analyzed and coded using NVivo.

Population

The population for this study involves exemplary learning and development leaders in corporate technology organizations in California. According to Creswell and Plano Clark (2011), a population is defined as a collection of individuals or objects

within a particular group known to have common characteristics or traits. For the purpose of this study, corporate learning and development leaders are people who oversee the training and growth of all members of the organization.

The population considered in this research study is estimated at 5,180 learning and development leaders in California according to the U.S. Bureau of Labor Statistics for May 2019. Learning and development leaders are tasked with identifying learning gaps and unanticipated future needs among an organization's teams and individuals and developing the strategies and learning plans necessary to bridge these gaps and align employees' goals and performance with those of the organization (Ashbaugh, 2013). These leaders manage learning designers, and they are responsible for attracting and retaining talent and creating a value-based culture of engagement and motivation through developing programs that ensure that the organization is constantly evolving and developing (Brassey et al., 2019). With 5,180 learning and development leaders in California, the target population for this study was narrowed to the estimated 430 learning and development leaders in technology companies publicly traded companies on the NASDAQ in California based on conversations with learning and development leaders from Facebook, Amazon, and Qualcomm.

Sample

A sample population is the group of subjects who participate in a study and become the data source for the research (Creswell, 2008; McMillan & Schumacher, 2010; Patten, 2012). McMillan and Schumacher (2010) argued that sampling is selecting a "group of individuals from whom data are collected" (p. 129). Similarly, Patton (2015) and Creswell (2003) maintained that a sample is a subgroup of the target population

representing the whole population. The sample in a qualitative research study is often random; however, the sample population for this qualitative study was purposeful and criterion-based. The criteria used for this study included eight learning and development leaders who demonstrated at least four of the following criteria; the first three were required.

1. Evidence of caring for people in the organization
2. A minimum of 3 years' experience as a corporate learning and development leader
3. Evidence of extraordinary results
4. Articles, papers, or materials written, published, or presented at conferences of association meetings
5. Recognition by peers
6. Membership in a professional association in their field

Creswell, Hanson, Clark Plano, and Morales (2007) advocated for a sample size of a qualitative research to be five to 25 participants, while Morse (1994) suggested that number to be at least six to 10 participants. The thematic research team considered time allocation, available resources, and the purpose of the study to establish the sample size for this study (Patton, 2015). The thematic team agreed on eight exemplary corporate learning and development leaders as the sample size for this study. This was produced from the target population of 430 corporate learning and development leaders in California.

Participant Demographic Data

To ensure confidentiality, the research participants were referred to by pseudonyms and not by name, work, location, or employer to ensure confidentiality. Any

information that could potentially give away any participant identity, was not mentioned in the study. Each participant was assigned a number from 1 through 8. Each participant also met at least four of the criteria to be considered exemplary, with the first three being required. Table 2 provides the demographics for each participant. Table 1 displays the researcher’s criteria to denote that how each participant met the exemplary requirements.

Confidentiality of all study participants was maintained by assigning each participant a number corresponding to his or her unique data set. Information that could potentially identify a participant, such as individual name, name or number of employees of organization, was not referenced in the study. The participants consisted of two women and six men. The mean age of learning and development leaders was between 45 and 55 years of age. The average years as a corporate employee were between 26 and 30 years with an average of 16 years as a corporate leader and 4 years in their current role. Table 2 provides the demographics for each study participant, and Table 1 (repeated here for ease of reference) presents the criteria for which an exemplary leader qualified for the study.

Table 2

Participant Demographics Data

Corporate L&D leader	Gender	Age	Years as a corporate employee	Years as a corporate leader	Years in current role
Leader 1	F	40-50	20	10	6
Leader 2	M	50-60	25	17	5
Leader 3	M	50-60	33	20	3
Leader 4	M	40-50	26	14	3
Leader 5	M	40-50	22	10	5
Leader 6	M	60-70	32	23	4
Leader 7	F	55-65	32	20	4
Leader 8	M	40-50	22	16	4

Table 1

Characteristics for Exemplary Learning and Development Leaders

Study participant	Evidence of caring for people in the organization	A minimum of 3-year experience as a learning & development corporate leader	Evidence of extraordinary results	Articles, papers, or materials written, published, or presented at conferences association meetings	Recognition by peers	Membership in a professional association in their field
1	X	X	X	X	X	X
2	X	X	X	X	X	X
3	X	X	X	X	X	X
4	X	X	X	X	X	X
5	X	X	X	X	X	X
6	X	X	X		X	X
7	X	X	X	X	X	X
8	X	X	X	X	X	X

Presentation and Analysis of the Data

Chapter IV presents the analysis of data collected from eight learning and development leaders in technology corporate organizations in California. The findings are aligned with the four principles of Mark Crowley's (2011) heart-led leadership.

Data Analysis

Audio and video from each interview were recorded on the Zoom video conferencing application. Data were transcribed and then imported to NVivo qualitative analysis software. Data from interviews were coded for themes according to the four principles of heart-led leadership. Upon completion of coding, the number of sources and frequencies providing data were analyzed for each theme. Finally, the findings were further analyzed for key findings, leading to conclusions.

The semistructured open-ended interviews were conducted using Zoom Video Communications with a built-in the transcription feature available through the application. The data were downloaded and transcribed and then sent to participants to confirm their accuracy. When transcripts were approved and validated, the researcher used transcripts to identify themes using NVivo qualitative data analysis software. The data were then coded for themes pertinent to Crowley's (2011) four heart-led principles. After coding each interview and artifact, the number of sources and frequencies supplied the data for each theme. The researcher further reviewed the data for key findings leading to conclusions and implications.

To conduct the research study, the researcher coded both the interviews and artifacts for themes based on the four heart-led principles: building an engaged team, connecting on a personal level, maximizing employee potential, and honoring and valuing achievement. The interviews comprised eight semistructured interviews with 12 questions each. All interviews were conducted using Zoom Video Communications and were completed Monday through Saturday between 8:00 a.m. and 7:30 p.m. The artifacts collected included weekly updates, email communication, well-being messages, performance reviews and award communication, information, and nominations. Coding resulted in 20 themes and 466 frequencies. Themes were developed according to information collected during interviews and from artifacts and produced a total of 20 themes altogether. Building an engaged team yielded six themes while connecting on a personal level and valuing and honoring achievement produced five themes each. Finally, maximizing employee potential generated four themes

Of the 466 coded frequencies, building an engaged team produced six themes and 154 frequencies representing 33% of the total frequencies. The second highest frequency was connecting on a personal level with 28% of the 132 frequencies coded across five themes. The third highest frequency came from valuing and honoring achievements with 26% of the 122 frequencies coded across five themes. Maximizing employee potential produced the fewest number of four themes and 58 frequencies with a percentage of 13%. Frequency refers to the number of times from the interview sources and artifacts that the theme was referred to. Figure 6 represents the number of frequency codes and themes within the four heart-led principles. The data from Figure 6 suggest that building a highly engaged team was the most important theme for learning and development leaders, while

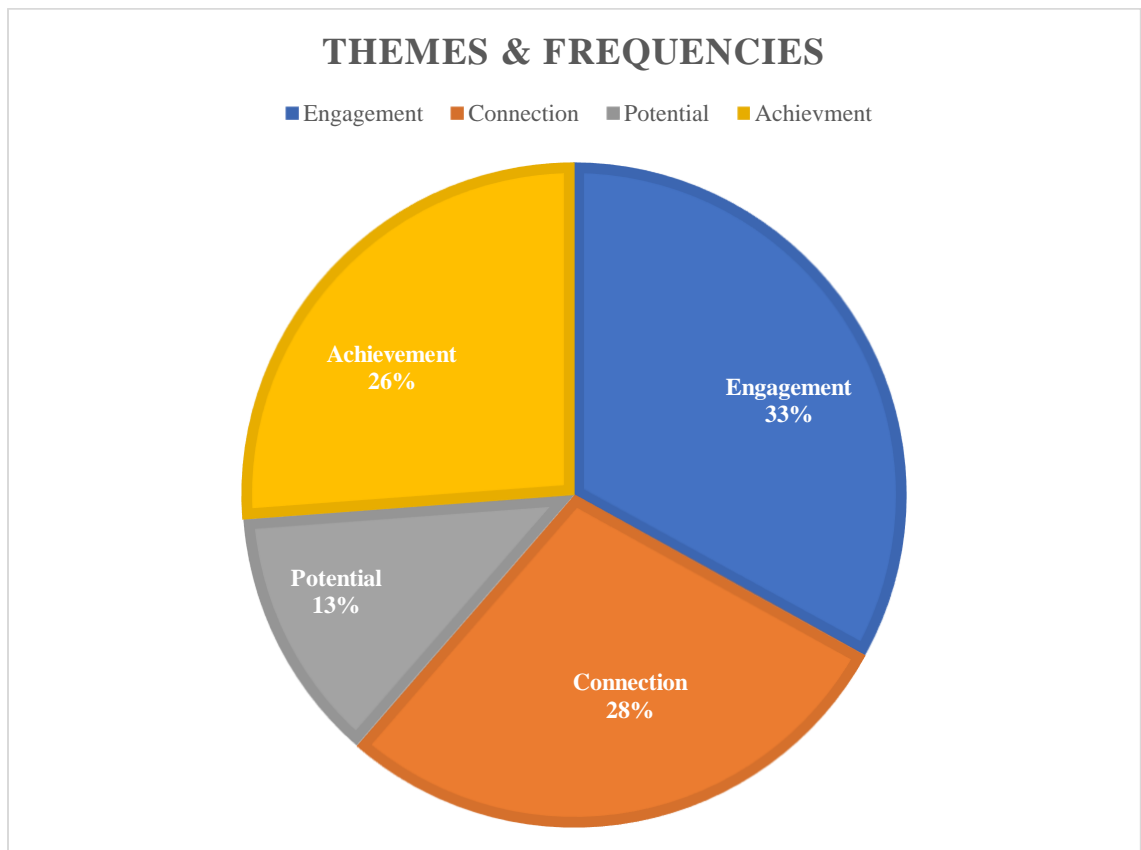


Figure 6. Heart-led principles percentage of frequencies and themes.

connecting on a personal level and valuing and honoring achievement ranked equally high in importance second to engagement, and finally, maximizing employee potential ranked the least in importance to some leaders. Worth mentioning here is that engagement seems to score so high mainly because it seemed to be a present theme across the data from each of the principles.

Research Question and Subquestion Results

Research Question 1

How do learning and development leaders lead from the heart to accomplish extraordinary results by building a highly engaged team?

The team of researchers defined building a highly engaged team as using strategies that help people become enthusiastically invested in and dedicated to work they believe is significant, meaningful, and challenging, where relationships are built on emotional connection and shared vision, and values and commitment are based on personal strengths and interests aligned with organizational goals (Crowley, 2011; P. S. George & Stevenson, 1988; Rees et al., 2013; Senge et al., 2007). The interviews with learning leaders produced six themes in building a highly engaged team, which resulted in 154 frequencies. This was the highest number of frequencies with a percentage of 33% of all thematic codes. Table 3 represents the number of times the interviews and artifacts were used for each theme for this heart-led principle.

Table 3

Themes of Building a Highly Engaged Team

Theme	Interview sources	Artifact sources	Total sources	Frequency	
				<i>n</i>	%
Working alongside staff builds their strengths and engagement	7	2	9	38	24%
Involving staff members in projects impacting company success builds engagement	7	0	7	33	21%
Providing opportunities to view diverse personal success as professional successes	6	1	7	27	16%
Empathetic leadership builds emotional connection	8	1	9	24	15%
Being passionate about the work builds engagement	4	2	6	22	14%
Providing opportunities to be part of the company goals and strategies builds transparency	7	2	9	18	11%

Working alongside staff builds their strengths and engagement. This theme was referenced 38 times in nine sources. This theme represented 24% and scored as the most observable frequency for the heart-led principle of building a highly engaged team. Working alongside staff involves being in the trenches with employees as they face everyday opportunities and struggles. Leaders who work alongside their team members know, grow, and involve them to align them with company strategies and goals, and to learn how to coach and mentor them to get them to achieve their maximum best (Gebauer et al., 2008). Working alongside staff builds trust in the leader and increases their concern for their staff (Gebauer et al., 2008). Working alongside staff makes leaders

aware of the daily struggles that their staff face but also allows them to celebrate the small as well as the big wins of the team. This is especially important when it comes to knowledge of workers who do not necessarily work with tangible products. Working alongside of them allows the team to earn some satisfaction from the intangible work that they do during a long day's work (Gebauer et al., 2008).

All but one of the interviewed learning and development leaders stressed the value of working alongside their staff to achieve maximum results. Leader 7 shared how working in the trenches with the staff builds engagement and dedication to the collective work of the team:

I think it is very important to be with the team in the trenches. I am never someone who just got an update on the status, once a week. I am always there supporting the team connecting with the team members to understand the hurdles, what help they needed and, if they were working long hours, I am there supporting them, even when I am remote. I'm there, supporting the team when they work the long hours, so I think those three things are very important to develop a dedicated team.

Another leader shared that working alongside staff and supporting them from within contributes to the leader understanding their struggles at a closer and deeper level:

Leading the way, that certainly is one view of leadership, but a much humbler way is to be behind the scenes and saying what can I do? What can I see? How can I help? How can I support? As a leader out front you don't see what's going on behind you. That's your ego leading the way to a degree, versus being behind and supportive. You can see when people are stumbling and are being challenged

and you can do a much better job of making sure that they're getting the support that they do need.

Another learning and development leader shared a similar idea about working with and alongside staff:

It changes the perception of "hey, I'm there and 'my boss,' is there to support me" versus "hey I'm there, and my boss, is there to tell me what to do." It's a very different personal connection. It enables a person to do the work when they feel supported versus enables the person to do work when they're told what to do. It's a different type of enablement there. And it's a much more personal level, because in that particular case if they're struggling with something they feel enabled to ask for help.

One artifact also identified content supporting working alongside staff in an effort to build supportive relationships. The following statement was provided in a performance evaluation narrative of staff to their leader: "You put your efforts and time to tackle individual tasks of team members and you spend time with us on these tasks to better execute these tasks."

Another artifact provided a clear example of caring leadership that works hard to support and engage team members: "My leader has exceeded my expectations as a lead in many ways. He is very engaged in all aspects of teamwork, and he cares so much about developing his people and making us the best we can be."

Involving staff members in projects impacting company success builds engagement. This theme was referenced 33 times in seven sources. This theme represented 21% of the heart-led principle of building a highly engaged team. Employees

who felt most engaged at work were also led to believe that their success impacts the organization's success (Gebauer et al., 2008).

During interviews, 87% of participants underscored the value of involving staff with projects that influenced the company's success. One learning and development leader appreciated that the value of involving staff members shows that everyone is part of the process and part of the success of the organization:

I'm looking for sustainable engagement for my thriving workforce, where we need them to continue learning that's one aspect of engagement. The second one is we make sure that what they do really contributes to the success of the team, the project and the company.

The same leader explained how his role is to make their staff "understand what they do and how it fits the whole company strategy, how their work really influences the company."

Another learning leader emphasized the value that being connected to stakeholders brings to the quality of work and engagement: "One strategy I use is to put employees in touch with their stakeholders or their customers. Understanding the pain of the customer, is necessary to devise the right solutions and to innovate." A different learning leader mentioned that engagement comes from understanding that "what they're doing is part of that knowledge" of what the impact of their work is: "Meaningful work comes by enabling and being transparent with every single member on the team as to the why we're doing something." Another leader explained the value of making that connection between how the employees' efforts contribute to them, the people using that product, and the company's bottom line:

I think the best way to do that is to show the team where their effort is going, what is the accomplishment going to do to them, what is a good way to deliver a product that's going to impact their lives. How is it going to impact the company's bottom line and how is it going to impact the client at the end of the day. So, it's very important to be clear on all fronts, here is why we're doing this. Here's what it's going to take to do this, and if you do a good job, here's what it means to you.

A different learning leader highlighted the value that leaders can add by providing thoughtful consideration of how their team's work fit into the company's broad goals and achievement: "People want to see their work used, they want to see it utilized, and then they want to see how it would utilize in the big scheme of thing, and I think I've always found that to be very motivating for people."

Providing opportunities to view diverse personal success as professional success. This theme was referenced 27 times in seven resources and represented about 16% of the coded content for the principle of building an engaged team. Diversity among team members is viewed as a necessary component to innovation and achievement of the company's goals and creating a culture where diverse skillsets and perspectives contribute to the success of the organization (Schein, 1996).

Of the participants, 75% explained the value of having a diverse set of talent on their teams. They attributed diversity in the culture to facilitate the contributions of a diverse work force to the success of the individuals as well as the team as a whole. One participant explained that the best way to utilize diversity in the team is to engage team members "individually and as a team to ensure we have equal opportunity and make sure

we understand each one's strength and align it and give them opportunity to lead a subproject, so workload balance is one way to achieve engagement.” Another learning and development leader viewed diversity as an essential component of the team's accomplishment. This is especially important in a technology organization where there is a lot of very smart talent all competing for innovation and high achievement. This leader said,

I make sure my team understands at a team level and individual level to really expect diversity of thought, diversity and approach. Expecting diversity is very important for us to really allow people to not feel like we're imposters. The imposter syndrome surfaces as a result of your not being comfortable in the situation, and you don't want to say that you don't believe you fit in.

Empathetic leadership builds emotional connection. This theme was referenced 24 times in nine resources and represented 15% of the coded themes for this principle. Empathetic leadership helps build deeper relationships between leader and staff. It is the ability to understand the feelings and perspectives of others with compassion and trust (Ferch, 2005; J. M. George, 2000; Van Dierendonck, 2011).

During the interviews, 100% of the participants agreed that empathetic leadership was fundamental to building trust and an engaged team. One learning and development leader explained how empathy allows a leader to love and protect their staff: “Love means making that connection with others and requires the ability to communicate authentically and in the case of performance evaluations, having the ability to speak with clarity about the future of the team and each member in it.” But it is not exclusive to the leader, it involves building an environment where everyone feels valued and cared for

and this is what creates that emotional connection. As Leader 2 puts it, “Emotional connection is built on knowing my team members and they know that I am interested in their success.”

Yet another leader explained that when leaders build trust among the team members, it propels each member to work their part as their way of demonstrating their commitment to the team success:

So, you strengthen that trust by the relationship that you build over it with the execution relationship. So, basically, everybody is expected to do what they need to do, and they know they are trusted with this, so they will not want to let you down because of that, that is the trick.

A third leader shared that empathy allows the leader to build rapport with their reports thus making it possible to notice differences in behavior or demeanor:

I had a team member that was going through personal situations which distracted them from their work. They were going through a hard family-related series of events and as a leader you notice that type of behavior because of the rapport you build with the team members.

The same leader continued, emphasizing the importance of knowing how to handle the situation empathically:

The difficulty is exemplified by their lack of passion they’re distracted. Their change in behavior towards certain milestones and goals that you were driving to the only way I knew to help, and the only way I continue to help is to do it with empathy, understanding, and having a safe space where the team member could share what they were going through.

This same concept was shared by another participant who understood the importance of being able to detect when something was happening concerning a team member: “One of the things that I pride myself on is being able to detect if something is up with my employees.” The same concern for staff’s well-being was also felt and articulated by another leader: “I always have one-on-ones, and these one-on-ones are not just focused on the work and ‘Hey, what’s going on with that product or with that technology,’ it is more focused on what is kind of going on in their lives, what is going on, besides that.” One artifact was referenced for this theme, and it was a part of an award nomination attesting to a leader’s multiple demonstration of empathy.

Being passionate about the work builds engagement. This theme was referenced 22 times by six sources. It was referenced in 16% of the coded themes in alignment with building a highly engaged team. Kouzes and Posner (2007) explained that exemplary leaders construct a path to address ambiguity by sharing their passion confidently and communicating their vision clearly.

In the interviews, 50% of the participants stressed the value of passion in building a highly engaged team and in doing the work after they have been hired. Leader 3 explained how passion is an essential component of the recipe for success especially in high tech organizations:

I would call it the recipe of success to my potential in this in the high-tech organizations. And it does start with passion. Employees need to be passionate about the technology or the type of work they are about to start, or they will not be hired for. Education has value, personal skills have value, but to have real strong execution and eagerness to curiosity and learning, passion is a big part of

it, so we need to choose the right people who have passion for doing certain technology.

The same leader continued to explain that leaders need to be passionate about their work as well,

Don't shy away from talking to me about anything. I want this to be a transparent organization and if you're not passionate about something, you shouldn't be doing it. And I am passionate about what I do, but I also encourage my staff to be transparent about that and be able to talk it out with me.

Another learning and development leader explained that “dedication to the team comes from passion. It comes from really believing and understanding and being emotionally committed to doing their best to achieve that collective work.” Similarly, a leader should have passion, but in order to “develop a team that has passion, you must have that passion, to begin with. So as a manager, as a leader, the very first thing is follow the rule of taking work that you are passionate about—that's an interesting way to catalog it.” The same leader explained the critical need for passion as a pathway to dedication:

What I do as a manager is make sure that my team is doing what they are passionate about. If they can't find the passion after multiple attempts, it's my job to actually help them find something else in other teams that potentially may be closer to what their passion is. So, you end up with a team that has this shared set of values, this shared set of perspectives around the work that they're doing, and that creates dedication. Because when you like what you're doing, when you

really love and are passionate about what you're doing, dedication is far easier to manage, and it is not a one-time event.

However, passion and dedication to the work is continuous and leaders need to be able to keep it alive and well for themselves and the team:

Passion . . . It is a continuing exercise. Work often slightly shifts one way.

Potentially things don't go exactly as planned and as a leader, it's the ability within myself to continue to find that fervor that passion and continue to bring that team forward so that we're constantly doing the work in a dedicated, invested way. . . . [And] Transparency is a great part of understanding and ultimately that passion carries those messages with them that hopefully meaningfulness is just a package of being dedicated and passionate.

Another leader emphasized the need for passion and enthusiasm for work:

I think, ideally, when you're developing a team when you're actually going through the hiring process, people who are enthusiastic about their given work, who are passionate about that given area is as important, if not more than their intelligence.

Two artifacts were referenced in this theme. The first came in a recognition email where the staff member gets recognition and a shout-out from a member of another team. Their collaboration and passion helped carry the collaborative work through. The second artifact came from a performance review. The leader was impressed with how much passion and dedication this one employee demonstrates on a regular basis.

Providing opportunities to be part of the company goals and strategies builds transparency. This theme was referenced 18 different times by nine sources. The theme

was referenced in 11% of the coded themes in alignment with building a highly engaged team. Employees who are engaged with their work and the work of their organization, demonstrate more confidence and commitment to make a positive action (Gebauer et al., 2008). During the interviews, 87% of participants shared information related to transparency being the outcome of providing opportunities to be part of the company's goals and strategies. One leader shared that her team's work is valuable by tying to the company overall goals:

I think they need to tie it to the overall company goals. The work that we're doing is related to these goals of the company's and, therefore, because we are contributing to the company's goals, your work is valuable making it very clear that what they're doing is not isolated it's part of this big effort.

Another leader expressed a similar thought:

We have a project where they have been working hard, and I kind of told them if your work is presented to certain leaders in the department, they will get value. They will have visibility of their work. They will be open for the opportunity to use whatever they spend time on in a more meaningful way.

Another leader emphasized the connection between meaningful work and the passion and dedication to be part of the work that the team does every day as part of the organization's global goals:

Meaningfulness is part of that dedication. This is why we're doing this. This is the impact that we're going to have. These are the results that we expect to this problem that we're going to solve on a day-to-day basis.

The same leader shared that there should be a way to track the work toward the company goals. It is one way to measure that impact:

So, it's just a way to frame the projects towards the greater goals. In many cases, emotional goals are fine. You have to have a way to track it so that you're progressing. So, you define that baseline before you start and then you come back every 3 months and you see where it is. Then every 6 months, and you see where it is, and you reflect that to the team. Meaningfulness comes with "yes, we made an impact we understand why we're doing this. This is actually moving the needle. Let's keep doing this. That's how we made work meaningful for a specific project. There's an impact."

Similarly, another leader explained that understanding the company strategy and how the team's work fit into it was very important to keep the team engaged:

So, with the projects that we took on with our clients, it was always very important to explain to our team members who are working on the product what this product is going to go into. Why it was so important to that company, and I'll share with them the company's strategy, the company's growth plan and the product vision. So, we always did that we always had interlocks with the client, understood vision for that product strategy and how what we were doing fit into that.

Another leader same the thought:

I think that connects back to the fact that in this all hands like I mentioned, I covered the strategy of the company with quite a lot of detail, from a financial perspective from a technology perspective from a roadmap perspective. And

many of the guys usually come back to me afterwards and say hey this really gives me the perspective that I'm doing this small thing but hey it has a much larger meaning to the company, and I think that is absolutely always critical.

Two artifacts were referenced in this theme. The first was an award nomination in which the leader explained how their employee is always interested in tying their work with the company strategy that has been shared by the leader. The second artifact was a performance review of the leader in which the employee explained how the leader makes every effort to relate the employee's work to the company strategy and the impact this employee has on the team, the product, and the overall organizational strategy.

Research Question 2

How do learning and development leaders lead from the heart to accomplish extraordinary results by connecting on a personal level?

In this research study, connecting on a personal level was defined as seeing and acting on behalf of others and authentically communicating with the intention of adding value driven by humility, concern, and love (B. Brown, 2015; Crowley, 2011; Hayward, 2015; Maxwell, 2010). The coding for themes for this principle resulted in five themes. The five themes were referenced by the eight participants with frequency of 133 times. Connecting on a personal level generated the second highest number of frequencies with a percentage of 28% of all thematic codes. Table 4 represents the number of interviews and artifacts for each theme for this heart-led principle.

Table 4

Themes of Connecting on a Personal Level

Theme	Interview sources	Artifact sources	Total sources	Frequency	
				<i>n</i>	%
Communicating authentically builds trusting relationships with employees	7	0	7	35	27%
Recognizing accomplishments individually and collectively builds transparency	7	1	8	30	22%
Investing time to connect with employees builds emotional connection	6	1	7	29	22%
Providing gratitude through verbal and nonverbal communication	5	5	10	23	17%
One-on-one conversations build connection	6	6	12	16	12%

Communicating authentically builds trusting relationships with employees.

This theme was referenced 35 times in seven sources. It represented 27% of the coded themes aligned with the principle of connecting on a personal level. Leaders who engage their staff with authentic communication build trusting relationship in their organization (Bowman, 2014; J. E. Glaser, 2014; Seidman, 2007).

During the interview, 87% of participants shared information that authentic communication is critical to building trust among the team and with the leader. One leader shared that authentic communication builds trust and adds value to their team members' work:

Actually I maximize the value of their work, and that will give them more meaning of what they do because managers are supposed to have a better

understanding of the big picture, how to communicate, how to present the work, how to get more value for their work, and I think once they trust you, they feel you are adding value to their work, and the result will become more meaningful.

Leader 2 shared that communicating authentically is “the ABC of communication, there’s no communication without authenticity.” He added, “I’m going to repeat what I said about integrity being the biggest piece of success for leadership and where you might not want to say everything, but never say something wrong or anything that is a lie.” He also commented that authenticity is basic to the work and products of technology companies, there’s no room for sugarcoating in this business: “In a technology company, everyone has to be authentic otherwise they get the wrong products. People have to be truthful and authentic when dealing with each other. There’s no room for a grey area in their communication.” Another leader explained that leaders need to create safety for authentic communication to happen:

With a safe space comes the ability for people to have a voice and to use their voice to truly contribute to a shared mission and a shared vision. It moves teams from a team that only listens to what their leader is telling them, and therefore they just go off and do what they’re being told to do to a team that really discusses and solves problem together with input from every single corner of that team. The ability for that to happen in the safe space really starts with those relationships enabled through the safe space.

A different leader shared similar comments:

You start at the relationship with the safe space. You truly listen to every single person on the team who has an opinion, and you make sure that the end result is

understood. And it's not saying yes to everybody, but it is listening to everybody and truly being open to considering every single data point that they're giving them their vision, which then becomes a team vision and not the leader vision and that's how you get to that.

He explained that authentic communication needs to be a continual practice:

It's hard to pinpoint exactly if a singular time of communicating authentically made a difference because it needs to be a constant thing. So, I would argue that it's always important to the organization's success to foster a culture of transparency and authenticity.

The same leader added that authenticity is irreplaceable when it comes to dealing with issues that impact the team members:

And I think that often authenticity in that aspect that ensures the success of the projects that we were working on without us really addressing it, without us hiding it or not even exposing it. It would have been a lot harder for us to convince the rest of the team that they should take on a few other extra items and that are really delving into some of challenges.

Another leader explained that authenticity should be at the core of communication in the workplace because "I think when you are, authentic to who you are then it gives you that confidence and comfort to be able to communicate." He added that "communication is stopping and listening and asking those meaningful follow-up questions and really trying to understand where they're [team members] coming from and establish not necessarily a connection, but to establish an understanding as much as possible."

Another leader explained that it is important to communicate and communicate often not only to understand where things are but also to communicate at a high level to keep the team aware of what is going on with the organization, especially what is going on with the organization's vision and goals and where it is headed. In a similar fashion, leader 4 shared that it is always critical to communicate honestly with the team especially when you hire the right people:

If you give them honest feedback they turn around on a dime and they usually fix those things. That I've always seen this with my people, especially if you hire good people. If you hire high-achieving people, being honest with them is always the best policy.

Recognizing accomplishments individually and collectively builds transparency. This theme was referenced 30 times by eight sources. This theme represented 22% of the coded themes aligned with the principle of connecting on a personal level. A leader recognizes the contributions of others (Becker & Wortmann, 2009). Appreciating staff for their dedication and accomplishments demonstrates appreciation (Kouzes & Posner, 2007).

During the interview, 87% of the participants provided content related to connecting on a personal level. One leader commented that he spends quality time with each one and tries to get to know them and they know him. He is very transparent and open. . . . I give them that insight and show them that I am interested in their success or excellent performance, or I tell them that this is not enough, you need to do more. That kind of transparency and guidance.

The same leader added that the team had weekly rituals to spread appreciation and love to all:

I think the other way too is that kind of going back to know the retrospectives that we have on a biweekly basis; having kudos is an important piece, there we have an opportunity to spread that love around that that's appreciation for others. And I think that that's a big part of that too, because when you're kind of helping establish a community of care and everybody's caring about each other, that makes a big difference in how they see, how they might be concerned for them and how they're showing it.

Another leader shared a similar idea:

When we do our biweekly planning, and we have a retrospective that's an opportunity for us to both celebrate what we did well and to be humble about what we didn't write and try and make sure that we're addressing areas that could be better in the future.

The same leader noted that when there is success with criteria previously established, it becomes easy to celebrate that success:

Ideally when you're doing work and you have some kind of stated outcome, some success criteria, something that you can point to and say, "See I did this," and everybody's buying in and saying, "Oh absolutely you did it, great job!"

Another learning and development leader shared a similar thought:

And it's difficult, especially for those people who have young kids to be able to manage, along with all that's going on, but people have been very committed, so I basically thank them and tell them, "Look now is the time to take a break, take

some time off, spend more time with the family,” and that’s kind of one of the ways. Another way that you also do it, is that you, you make sure that if they have a challenge, you address it quickly and effectively.

Another leader shared that leaders cannot accomplish anything alone and how important it is to recognize the people around them for their success:

If you think you’ve accomplished everything on your own, you’re fooling yourself. It’s always everybody who supported you that got you to that place and recognizing that is a very important thing. Giving credit back to everybody around you for what you have become is so important and always tooting other people’s horns is so much more important than tooting your own, and I feel like it’s like Karma the minute you recognize people and thank them for what they’ve done.

One artifact was referenced in this theme. The artifact included one award announcement that read as follows:

Congratulations!

The team sincerely thanks you for contributing in 2021. Over 30 hours to course content creation and 553 training hours as an instructor. Amazing job! In addition, we will send you a certificate of appreciation, include you in a shoutout on our page, and award you a Developer Champion Badge.

Congrats!

Investing time to connect with employees builds emotional connection. This theme was referenced 29 times by seven sources, and it represented 22% of the coded themes aligned with the principle of connecting on a personal level. Leaders who invest

in facilitating inclusive practices, provide opportunities to take part in communication that begins to shape the organization (Groysberg & Slind, 2012).

During the interviews, 87% of participants provided content related to connecting on a personal level. Leader 3 shared that it is always important that, as a leader, “I am direct, trustworthy, honest and transparent and when I communicate with my team members, they know that I am authentic.” This leader also takes time to connect with her team members and as a team they “do things together like doing a yoga class together or going out for a meal and we get to know each other and build these relationships.” This leader added that she invests time to work collaboratively but also takes time for her and her team members to get to know each other personally: “Every month or sometimes on Friday we do something together. We have dinner together. We eat together and we get to talk about personal things, not work and we get to know each other.” Another leader examined how he deals with the team members:

We are all human so that caring about their growth, their success, and explaining to them why we give them low grade in certain situations. They understand it and I gave several reviews this week, everyone was happy and that’s exactly what the manager needs to do very well.

The same leader added that his team members often share feedback with the leader: “They share what they think, and they give me feedback and that help me understand what matters to them, so that really help us to develop the personal connection.” A different leader shared that he had to communicate openly with one of his team members who wanted to move to another team:

And I promised to support him or give him a good reference so, he will have no problem with that. I also promised him to be able to get his job back when and if he decides to come back to his team. . . . My goal as a leader was to get the most out of this employee even if it meant that his creativity and his success will happen with another team.

The same leader emphasized the significance of leading people:

If you are a leader of people, 80% of your job is to lead the people; 20% add value to the company in certain ideas and statistics. So, I do have direct connection with my people, talk to them in meetings and on a personal level when we work on a project.

He added that the open-door policy is a reality for him and gave an example of a team that he visited on regular basis:

I also invited them to come talk to me if they want or need to. I made it a habit to stop by sometimes and talk to them. I don't spend too much time, but I make an effort to show them I care about them, and I am concerned with getting to know them and what they do.

This leader gave another example of an employee who needed help and support because of her communication and presentation skills:

I decided to take a risk on her on the promise that she will agree to be coached and mentored and that's what I did. For the first 2 years it was a lot of work on my end, but I believed it was worth it. I mentored and coached and helped and supported and eventually her communication and presentation skills excelled, and she started moving up the rungs.

A different leader explained how the team came together to respond to an urgent situation with one of the team members:

First, because of the emotional connection that we already had with the rest of the team every single person on the team was on board with helping the person that was going through the problem. . . . The personal connection, as you start at that level you recognize that by serendipity, we're in this moment in time, we're together, we've crossed paths. We're intertwined in that we're here to support each other and your success is my success.

Another leader explained that emotional connection comes in the form of collaboration:

I think that that emotional connection comes when you understand what the other person's working on, when you care about their outcome, just as much as you care about your own outcome because you're thinking about how you can collaborate.

One artifact was referenced in this theme. This artifact included multiple biweekly perspectives that included kudos and shout-outs to other team members for collaborating with each other. This artifact included the following: "Thank you for your help with the CI curriculum." Another one: "Thanks for creating the chat rooms for the workshops! They are time consuming to create but support our learners and faculty."

Providing gratitude through verbal and nonverbal communication. This theme was referenced 23 times in 10 sources. It represented 17% of the code aligned with the principle of connecting on a personal level. B. Brown (2018) advised leaders to acknowledge and appreciate their team members as a pathway for connection. To boost

their team's individual and collective productivity and innovation, they need to provide an environment in which people feel understood, respected, and appreciated (Kouzes & Posner, 2006).

During the interviews, 62% of the participants in this study provided content related to providing gratitude through verbal and nonverbal communication. One learning and development leader, leader 1 shared that she cared about making their work meaningful to them: "I tell my team members that whatever is happening at work, they work with their strengths and that will help them be successful. I tell them that I care about what makes their work meaningful to them." The same leader shared that she tells her team members that she cares about them: "I always show my staff that I care about what's going on in their lives, we celebrate birthdays, and we go out to eat together and I tell them that I care about them and I want them to succeed and also be happy at work."

Another leader talked about appreciating their team members in front of them and in different ways: "You need to appreciate them in public in front of them without asking them to talk. And maybe that comes with a little bit of grace, maybe some recognition and money, and sometimes a promotion."

Another leader shared that appreciation should vary from one person to another based on what they appreciate; "appreciation," he explained, "is definitely one of those things where it's personalized. Every employee appreciates acknowledgement in their own unique way. What is appropriate or what they view as something that they appreciate, and value varies from one person to another." The same leader explained that informal recognition is always important too; "informal recognitions, I just think, are important."

Another leader explained the value of a simple thank you, “A small ‘Thank you’ sometimes goes such a long way.” The same leader pointed out that she made appreciation one of her weekly rituals:

I mean certainly you do events but that doesn’t happen, too often. But one thing that I always did at least once a week, I would pick one person from my team, and I would write something up about them and take it up the chain. So, send it to that person and say thank you for blah blah blah and copy the entire chain above me.

Five artifacts were referenced in this theme, and they represent different thank-you notes consisting of thank-you emails sent to team members to express gratitude for participation in an event or going beyond in every practice. They also include the thank you and kudos that go in the beginning of a team planning meeting. One kudos read, “Thank you to all the IDs for their work on the curriculum plans.” And another read, “Kudos to XXX for reviewing my CLs and providing very helpful feedback this last month.” One artifact was part of the company star program where the awardee was welcomed to the company Hall of Fame with a recognition and reward for exceptional contributions to the company success.

One-on-one conversations build connection. This theme was referenced 16 times in 12 sources. It represented 12% of the code aligned with the principle of connecting on a personal level. B. Brown (2018) explained that care and connection are absolute requirements for heart-to-heart, productive relationships. Leaders who invest the time to connect with their team members are in for a long-lasting connection with their staff.

Leader 2 explained that he prefers to talk to his staff:

The key word here is authenticity and, as a manager, I feel comfortable with it and it allows me to have flexibility with my staff and I have the skill set to be comfortable with my concern and love for the humanity in all of us. Instead of not talking or smiling to my staff, I effectively communicate with my staff organically and authentically.

The same leader talked about the power of connection:

I remember a situation where one of my employees was going to be laid off, but since I knew that, I worked hard with my staff to see that none of them gets impacted. I eventually had to come to tell each one of them to not worry because they will be fine. Love means making that connection with others and requires the ability to communicate authentically and, in the case of performance evaluations, having the ability to speak with clarity about the future of the team and each member in it.

Another leader shared those titles don't matter as long as the leader and staff can make a human connection: "The point is we are in this together, and we are human to human that we need to support each other, and I did. it doesn't matter if I was VP the CEO or whatever. It's just a human to human so take the titles out and talk to the human being."

A different leader talked about how the connection built with team members allowed for better rapport with the team members:

They were going through a hard family-related series of events and as a leader you notice that type of behavior because of the rapport you build with the team

members. . . . I knew to help, and the only way I continue to help is to do it with empathy, understanding, and having a safe space where the team member could share what they were going through.

The same leader connected with team members at the human level: “You drive with empathy. You understand your team members as humans first and not necessarily as employees.” Another leader shared,

I’m coming from a place where there’s an emotional investment between us so it’s really acknowledging it, maintaining that authenticity, maintaining transparency, and understanding who they are as people, what their environment at home looks like and caring about this.

Six artifacts were referenced for this theme, which consisted of emails to team members on different occasions where the leader communicated directly with the team member. In one of the emails, the leader advised the team member to not worry about work and focus on their health. In another email, the team member was thanking the leader for allowing them to work remotely while attending to their child’s move to college on the East Coast. Another email was an exchange with a team member who had to get some time off to take care of a sick family member. All the emails demonstrated a personal connection between the leader and the employee.

Research Question 3

How do learning and development leaders lead from the heart to accomplish extraordinary results by maximizing employee potential?

Maximizing employee potential was defined as igniting emotional drivers by promoting human well-being while proactively strengthening, teaching, and building

people toward high achievement (Burnett & Lisk, 2019; Crowley, 2011). The coding for themes under this research question resulted in four themes. The four themes were referenced by the eight participants with a frequency of 58 times. Maximizing employee potential provided the lowest number of frequencies with a percentage of 13% of all themes coded. Participants who talked about maximizing employee potential explained it as a win-win situation for the employee and the organization. They themselves acted as conduits to developing employee potential by knowing, growing, and involving their employees in the right kind of activities and projects while also mentoring and coaching their staff who did their part and worked hard to achieve their growth potential. Table 5 represents the number of interviews and artifacts for each theme for this principle.

Table 5

Themes of Maximizing Employee Potential

Theme	Interview sources	Artifact sources	Total sources	Frequency	
				<i>n</i>	%
Establishing a safe space for communication with leaders builds emotional well-being	6	1	7	21	36%
Positive communication builds motivation to achieve better	4	2	6	15	26%
Working within one's strengths build confidence in the value of contributions	4	1	5	11	19%
Providing ongoing assessment of employees builds emotional wellness	3	0	3	11	19%

Establishing a safe space for communication with leaders builds emotional well-being. This theme was referenced 21 times in seven sources. This theme

represented 36% of the coded themes in alignment with maximizing employee potential.

B. Brown (2018) described leaders as those who take it upon themselves to find the potential in people and processes, and who have the will and courage to nurture that potential. It requires self-awareness and results in self-confidence.

During the interviews, 75% of the leaders interviewed indicated that establishing a safe space is the playground of effective relationships between leaders and their team members. One leader explained the value of establishing trust through working within a safe space between leader and employee:

Actually, I maximize the value of their work, and that will give them more meaning of what they do, because managers are supposed to have a better understanding of the big picture. How to communicate. How to present the work. How to get more value of their work. And I think once they trust you, they feel you are adding value to their work, and the result will become more meaningful.

The same leader explained how trust is a catalyst of good relationships regardless of outcomes:

As mid management, it was important that I do that and assure them that the company will be fine. And sometimes you tell some people on your staff you're going to propose them for a promotion and whether it happens or not, they trust me and trust that I did my best.

Another leader explained the value of being accessible to his employees:

Increasing leadership engagement with the team is key, so that one of the things I do. I actually personally did 1 hour today with somebody. I make sure that

anyone on any level under me is able to book me and make sure they take their time, and they can speak about anything they want.

The same leader talked about showing love and concern:

I show concern and love by giving them the confidence to connect with me and know that I am interested in listening to them and interested in their well-being, I want to support them, and I care to give them the platform to voice their opinion or what they care about.

This same leader demonstrated how he provided the safe space for one of his employees who was conflicted about staying with the team or leaving it:

The important thing is that he has the safety to make whatever decision and he's welcomed to stay or leave and he's welcome to come back if he so chooses as long as he makes these decisions under the right psychological framework.

Another leader shared that safe space provides the right space for a difference in opinion and a variety of perspectives:

With a safe space comes the ability for people to have a voice and to use their voice to truly contribute to a shared mission and a shared vision. It moves teams from a team that only listens to what their leader is telling them, and therefore they just go off and do what they're being told to do to a team that really discusses and solves problem together with input from every single corner of that team. The ability for that to happen in the safe space really starts with those relationships enabled through the safe space.

One artifact was referenced in this theme and represents a statement in a performance evaluation. One of the employees described how the leader creates a safe

space for open conversations to happen for the team not only with the leader personally, but among team members altogether, “I appreciate the fact that you keep the communication open. This obviously boosts the morale and productivity of the team.”

Positive communication builds motivation to achieve better. This theme was referenced 15 times in six sources and represented 26% of the coded themes in alignment with the principle of maximizing employee potential. During the interviews, 50% of the interviewees spoke about the value of positive communication in motivating the team to achieve better. Sinek (2009) argued that everything that a leader does is communication. Valuing the individuals and showing concern for their well-being over the sheer fulfillment of their work demonstrates positive communication (Maxwell, 2018). In the face of challenges and doubts, one of the things that leaders do is to encourage their team members to keep going by positively reinforcing the success they experience. People appreciate validation (Maxwell, 2018).

One leader shared that positive communication comes from acknowledging that what the employees are doing is positive and brings value to the team:

They need to be using their strengths and their skills. They need to be acknowledged that they’re doing a good work so all of those things are going to motivate them. When they feel empowered, when they feel like they’re achieving in setting up those conditions so that they can achieve.

Another leader talked about the power of encouragement in motivating their team members and maximizing their results:

I love maximizing potential because I can see it when the right leader becomes a multiplier, maximizers, 100 percenter, employees are delivering more, and they

are benefiting the business. So, managers who are picky about what they are trying to accomplish, use the guideline rigidly they end up making mistakes, they end up demotivating their employees and productivity will go down. So, emotional well-being means you want them to be successful.

The same leader also talked about the leader's ability to change how team members think of themselves and the power to motivate team members:

One way that allows leaders to provide opportunities to achieve at a higher level is stretch assignments where you have the potential to lead a project. You have a potential to do this work, so you need to make them see themselves in a better angle, because as a leader, if you tell them, I believe you have great potential, they will believe in themselves.

Another leader talked about authenticity as a pathway for good communication regardless of the message:

[The] "I completely understand model" that I just expressed as something that is authentic because I'm telling them, as a person, how it's making me feel and even though the messages aren't necessarily great, they at least know that I'm on their side. Communicating authentically is truly not telling people what they want to hear, but what they need to hear, and that's just inherent in every single way of communicating with them.

Two artifacts were referenced in this theme, and they consisted of two statements from different performance reviews where one employee talks about the degree of positivity that comes through discussing certain topics with their leader regardless of whether it impacts them or not: "He has the talent to make work interesting by inspiring

and motivating his managers to become more productive and innovative.” The second artifact came for a similar testimony of another leader: “demonstrates that relationship building, and career development go hand in hand. He knows that successful career do not from ‘I’ not from ‘we.’ . . . He communicates, mentors and takes the initiative to elevate the career of all his staff.

Working within one’s strengths build confidence in the value of contributions. This theme was referenced 11 times in seven sources and represented 19% of the coded themes in alignment with the principle of maximizing employee potential. Crowley (2011) encouraged leaders to seek to stretch the strengths of their team members and not to undermine the unique values that they bring to their profession. Kouzes and Posner (2006) explained that no one leader can do it alone, and it is best if leaders think of what is best for the company rather than for themselves. That is why they should view their role as the capacity to maximize the effectiveness of the team.

During the interview, 75% of the interviewees spoke about the value of having a leader who appreciates their strengths and allows them to work within these strengths to achieve extraordinary results. One leader shared that aligning strengths to work requirements boosts employees’ moral and self-confidence. She talked about the value of empowering her team members to appreciate their strengths, “They need to be using their strengths and their skills. They need to be acknowledged that they’re doing a good work. So, all of those things are going to motivate them.”

The same leader talked about one of her staff members who comes from a teaching background, and “she doubled the number of instructors from LA in one year, she doubled the number of people that were trained to do our program. And so, that was

an incredible achievement on her part, but it was because she was drawing on those strengths.”

Another leader talked about team members getting the most out of their roles and that should be gratifying:

But there’s been other places that I’ve worked at where I worked actively with individuals to make sure that they were getting what they needed out of their role, out of what they were doing out of their work. And part of that was to make sure that they got the skills and that they got those opportunities to acknowledge that.

A different leader shared that those strengths and weaknesses are part of every team and investing in the team member’s strengths and building their shortcomings makes for a very balanced team:

That goes back to having career or development plans where you always discuss with your employees their strengths and weaknesses and the areas that they would like to develop for personal reasons, and the areas that they would like to do but develop for the project accomplishments or the skills that they would need to develop in order to deliver with excellence. So, that’s an ongoing thing. You’re never going to be shining from every facet, and so, by building a team that complements each other is very important, where you have all the needed skills, but not all these skills can be in one individual.

There was one artifact for this theme where one team member talked about how the leader invests in the strengths of their team and helps mentor and develop their shortcomings, “He does whatever it takes to improve the performance and growth of his

team members with a deep sense of caring and mentorship to develop the strengths of his team.”

Providing ongoing assessment of employees builds emotional wellness. This theme was referenced 11 times in three sources and represented 19% of the coded themes in alignment with the principle of maximizing employee potential. During the interview, 37% of the interviewees talked about building emotional wellness through providing ongoing assessment. Gebauer et al. (2008) explained that providing feedback to employees helps develop their strengths and boosts their engagement. One leader shared that responding to employees’ needs is important for their well-being, “being responsive to whatever that employee needs to keep their well-being.” One leader explained that even he as a leader is lifted by his leader’s feedback:

I will give you an example of me. My manager who recently gave me a 5. I gave myself a 4 for getting things done. That was wonderful to see from him because he got last comment. It was honest to tell me, you are amazing, you are juggling tons of stuff—that was really meaningful, [meant] a lot to me.

The same leader talked about how his feedback to one of his employees helped lift that employee and allowed him to focus on growth rather than weaknesses, “So don’t belittle yourself, believe in yourself and now let’s talk about even how to get you to 4 versus 3, what can we do?” He continued, “I always acknowledge my staff’s achievement and performance. That’s continuous feedback; one on one, among our department, and publicly. . . . I find it when it matters and to be authentic it’s very critical and I hate when people don’t give me feedback.”

Another leader shared that sometimes when dealing with introverts who shy away from talking in front of people, they end up being deprived of many opportunities to have strong presence in front of their peers, but “you need to appreciate them in public, in front of them, without asking them to talk. And maybe that comes with a little bit of grace. Maybe some recognition and money, maybe even some promotion.” There were no artifacts for this theme.

Research Question 4

How do learning and development leaders lead from the heart to accomplish extraordinary results by valuing and honoring achievements?

Valuing and honoring achievements was defined as praising, acknowledging, recognizing, and appreciating positive accomplishments as an expression of care through monetary and/or nonmonetary rewards, which may lead to increased job satisfaction (Brun & Dugas, 2008; Crowley, 2011; Posamentier, 2008; Tessema et al., 2013). Coding for themes in valuing and honoring achievement resulted in five themes. The five themes were referenced by the eight participants with a frequency of 122 times. Valuing and honoring achievements offered the third highest number of frequencies with a percentage of 26% of the thematic codes. Table 6 represents the number of interviews and artifacts for each theme of this heart-led principle.

Table 6

Themes of Valuing and Honoring Achievement

Theme	Interview sources	Artifact sources	Total sources	Frequency	
				<i>n</i>	%
Appreciating employees via multiple modalities (events, emails, awards, rewards)	6	5	11	33	27%
Creating opportunities for growth and appreciation build confidence in achievement	4	2	6	27	22%
Demonstrating appreciation through offering opportunities for employees to shine and through visibility	6	0	6	22	18%
Showing appreciation to employees through corporate and personal gifts	5	0	5	21	17%
Providing opportunities for kudos and weekly and routine appreciation promote high achievement and success	5	3	8	19	15%

Appreciating employees via multiple modalities (events, emails, awards, rewards). This theme was referenced 33 times by 11 sources with a frequency of 27% of the times in alignment with valuing and honoring achievement. B. Brown (2015) considered acknowledgement and appreciation opportunities for connection. She advised leaders to always recognize team members for their unique skills and aligning their specific contributions to the team's successes. She advised leaders not to hesitate to celebrate their team members' achievements, both big and small (B. Brown, 2015). During the interview, 75% of the participants shared content aligned with appreciating employees via multiple modalities. One leader shared that she uses one social media-like tool to generate thank you notes and awards for her employees. She does that on regular basis and across the organization.

We have a thank you tool, it's like a social media it's like you go in there, and you pick the employee's name. You tell them why you're thanking them and then you pick a little something like a picture. And I use this tool, all the time, so I go in there, and you can award points. And then they get the points, and then they can get things, like a T shirt or there's all these kinds of prizes that you can get so I use that all the time across the entire organization.

The same leader mentioned that she and her team celebrate each other differently too, "We celebrate birthdays, and we go out to eat together and I tell them that I care about them and I want them to succeed and also be happy at work."

Another leader shared that he paid attention to their employees and got engaged with them on every occasion,

I simply pay attention to the people who work with me and around me and I care to be involved. I one time stopped a meeting and paid my condolences and asked the person not to worry about anything but to go and take care of his family.

The same leader explained that he gets involved because that is what human nature is all about, "I translate my true feeling that human life is number one priority. I don't go around poking into people's lives but if it comes to my attention, I make sure I emphasize that I care that they are doing well, and I make every effort to translate that into action."

Another leader shared that he takes advantage of well-designed system for recognition and reward:

It's almost something I don't have to worry about, but I would do if it was absent, which is the ability for you to recognize team members. There's a system that sends an email out to a group of people saying, "Oh. Thank you for, although you

stepped in helping me. Do this, and it was really valuable to me.” It’s just an email that gets recorded and then, at a manager level, every quarter you go, “I really want to congratulate these five people on the team.” They’ve gotten multiple of these awards and then my director collects the same thing upwards, and so forth. There are different types of awards, I am just part of that system and I’m very fortunate to be, but I’ve learned a lot from that system and the way you just promote its use is you do it, you value it, and when somebody sends an email, “Hello, thank you, Mary, for having helped me.”

The same leader explained,

So, you’re getting these congratulations and emails and it’s a cultural thing to just always respond. You see somebody congratulating somebody else in that email through that system, you just respond, and you do it, and you create that very loving culture of everybody’s giving you praises everybody’s tagging onto this. So, that system allows us to recognize achievements at different levels; the easiest level is that email base level.

Another leader talked about an award offered to employees for supporting their teams: “This is also to recognize managers and saying hey you’re demonstrating those characteristics that we see as important about supporting your team and so it wasn’t so much of driving a team to success.” The same leader talked about his favorite kind of appreciation,

So, there’s a wide range of how you can recognize that sometimes the little pieces are just as important as the big pieces and it kind of helps motivate people to do the things that sending out status emails are my one of my least favorite things.

Another leader talked about the power of thank you:

One thing I learned, and is that a small thank you sometimes goes such a long way. . . . So, I think it's very important to take the time at the completion of the project or on an ongoing basis, recognizing the small accomplishments of key that people are doing, because sometimes that's all it takes, I mean us as human beings, you and me. How many times do we get something done and we're like, "Wait why didn't [I] know, but why didn't anybody notice this?" And why didn't we get recognized for this, and we are looking for this affirmation that "Yes, you have done a good job here and you're on the right track." And so I feel that that's so important and there's so much by so many people and, yes, money is great and companies, especially today are throwing so much money at people.

The same leader continued,

I mean certainly you do events and but that doesn't happen too often, but one thing that I always did at least once a week, I would pick one person from my team, and I would write something up about them and take it up the chain so send it to that person and say thank you for blah blah blah and copy the entire chain above me.

Leader 7 talked about taking advantage of emails to recognize his team members:

Usually I do basically definitely email, which you give the person on time right when you see that "attaboy." What I also do many times is that when I get acknowledgement from a different team member that, "Hey, this person did an amazing job," I take action and recognize that acknowledgement.

The same leader shared that he would do different things to celebrate his employees:

At least for my staff, basically I've sent all of them like a thank-you bundle with some company swag and along with that some things in a thank-you card. So, I probably do that many times, the small things make a huge difference.

Creating opportunities for growth and appreciation builds confidence in achievement. This theme was referenced 27 times by six sources with a frequency of 22% of the times in alignment with valuing and honoring achievement. During the interview, 50% of the participants shared that content aligned with creating opportunities for growth and appreciation build confidence in achievement. Maxwell (2011) explained that great leaders are measured by their ability to empower others. The true value of influential leaders is to create change and facilitate growth (Gebauer et al., 2008; Maxwell, 2011). One leader shared that he aims to push his staff to higher levels of achievement to achieve more for themselves:

I want to push them to achieve promotion faster especially if they want to achieve that, but for the sake of fairness, I will push everyone to work up to their potential in order to achieve better whether they get a promotion or just get higher achievement on their performance reviews.

The same leader described how he helped one of his staff develop her skills in order to achieve better, move up, and take on more complex projects:

One of my reports had only had experience with small projects, and I proposed that she work on larger projects. I wanted her to broaden her experience and position herself in a better place to be able to move up and take on more complex projects. As a manager, I want the team that she is working on [to] take on more demanding projects and help her and them see the value of their work. So, I

guided them to have a broader perspective by doing more impactful work. Some projects will help them have more visibility and I kind of insisted that she take on this opportunity.

Another leader talked about creating opportunities for his teams to be appreciated for their good work and to reap the benefits of the visibility and growth.

Every week, I ask what good have we done that we can share with leadership this week? These big companies take from each other and the way that happens is they compete with their offerings and with their learning.

The same leader talked about one team who contributed to a big success for the company, and he made sure that they got to celebrate that win and that achievement:

I made sure the team that actually did the work, I called them for the meeting, and I told them that immediately. I told them the value of it and the potential of it as well, so they felt really good. I mean they've been working on it for 1 year and they can brag about it for the rest of their career. That's what everyone works for.

Another leader shared that when the team is working toward a collective goal, it is also important that employees realize their own growth and success, "But hopefully one feels well supported and strengthened along the way, so that they can get to that point where they're feeling that they're a high achiever that they're successful and can do what they need to do."

Two artifacts were referenced in this theme, and both came from performance reviews where the leader appreciated the learning and growth that the team members experienced and the high achievement that they managed to deliver as a result.

Demonstrating appreciation through offering opportunities for employees to shine and through visibility. This theme was referenced 22 times by six sources with a frequency of 18% of the times in alignment with valuing and honoring achievement. Honoring employees publicly establishes a sense of predictability that endures (Crowley, 2011). Crowley (2011) explained that stopping and appreciating employees widens their perspectives and renders challenges more manageable. Kouzes and Posner (2006) suggested that appreciating achievement in public strengthens the bond between leader and follower and is a win-win environment for all.

During the interview, 75% of the participants shared content aligned with demonstrating appreciation through offering opportunities for employees to shine and through visibility. One leader explained that offering opportunities for visibility is important for career advancement. He shared, “Another way of acknowledging achievement is by giving my staff the opportunities to shine through visibility opportunities in the department and also on the larger company platform.” Being selective and strategic is certainly another way to boost and invest in visibility; he said,

Performance will sure be appreciated, that their work is valued by all the metric like rating is really for sure an effective way to gain visibility, but we ensure that their work is really presented to the right audience by giving them a chance to present their work.

Another leader described how he relies on his teams of leaders and their teams to present their work to leadership:

If there is a high executive meeting, I ask the PMs [project managers] to share any winning projects that week. I don't talk about them; I ask the PMs to share about

their role and to bring the people who did something to come promote it and talk about it.

The same leader shared an experience with one of his talents who completed some amazing work for the company:

In one meeting I introduced his work, which was admired and appreciated, but then I introduced him, and I wanted everyone to know that he had this skill. I thanked him for the beautiful piece of work, and he was proud of his work, and it was clear, though shy, that he appreciated the clapping and appreciation that he received.

Another leader shared a similar thought:

One of the things I try to do is I make sure that I'm allowing my team members to step into a spotlight and shine. In order to do that, it comes with understanding what the expectation of that spotlight is. What the elements of my team member are and removing any obstacles to get them to shine when the spotlight is shown on them.

The same leader talked about how that process unfolds:

More often than not they're just shining they're the perfect team member to have taken that side project or resolve that situation, etc., and I track how they're doing, coach if necessary, but then let them carry all the kudos.

Then he added that high levels of achievement do not happen accidentally; they are nurtured and developed:

High levels of achievement come from doing the job well and being recognized for doing the job well, so it doesn't matter if you did it and nobody knows. It's

really about doing it extremely well and having somebody say, “Wow this person, they were perfect! I want them on all my projects.” That’s when you’re letting them shine. You find the spotlight, you understand it, you prep them, and then you let them get on that stage.

Showing appreciation to employees through corporate and personal gifts.

This theme was referenced 21 times by five sources with a frequency of 17% of the times in alignment with valuing and honoring achievement. Showing appreciation through personal and corporate gifts demonstrates an effort to go beyond to give appreciation (Kouzes & Posner, 2006). What is most important about gifts is the intentionality and thoughtfulness behind the gift giving, and that is very important and effective (Crowley, 2011).

During the interview, 62% of the participants shared content aligned with demonstrating appreciation to employees through corporate and personal gifts. Leader 5 shared that he is lucky to work for an organization that has a system to reward achievement:

I’m very fortunate that we do have a system at work that allows us to recognize our peers and our employees, and as a result, our employees now walk away in a highly visible way. It’s kind of cheating that using that system and promoting that system is a really great way to value and honor achievement.

The same leader talked about that system of awards:

We have monthly and quarterly awards. We have awards that get bubbled up at the org level being able to understand what my team is doing, nominating them for an award, documenting what they do, and writing a narrative as to what the

impact was. That's all intrinsic to make sure that the recognition system is being fed and living in a culture where recognizing and being thankful is very important. It starts at the ground level.

But that's not all, the system allows for awards to lead to other bigger and more substantial awards; the same leader said,

But that system allows us to bubble that up to very, very high levels, and in some [cases], the highest level is cash rewards and monetary awards, and in some cases, annual trips. The pandemic put a little bit of a damper on that, but you win this award, you get to go on a trip to Bali and things like that. So, I don't have to work on it too much, other than make sure my team and I are contributing to it.

Another leader talked about the nonmonetary and monetary awards at her organization:

It's not monetary but there are points that you can sort of take in like get things like they've got a store so it's not monetary, but there is sort of a gift associated with it. And then, of course, at the end of the year, we do go through performance reviews. So, everybody has a performance review and based on your achievements, you get a stock and you get a bonus, and all of those things. So, there is a monetary compensation to your achievement.

A different leader talked about the awards at his organization: "We have company stars which can be collected and exchanged by rewards and of course there are annual promotions, merit increases and bonuses." He added that there are ways to get the best acknowledgement: "That's really one way to do it, but I think the most effective way is to

show acknowledgement that they are performing very well, right now, they are exceeding expectations. They are getting [a] very good bonus.”

Another leader explained his strategy of bias for acknowledging the person and for the person:

I will always celebrate birthdays even with just the words and if someone has done something good, I congratulate them. I am always biased toward promotions, and I make sure the monetary recognition happens in ways biased toward the person. I am pro promotions and pro increase in salary or bonuses but don't use me.

Providing opportunities for kudos and weekly and routine appreciation promote high achievement and success. This theme was referenced 19 times by eight sources with a frequency of 15% of the times in alignment with valuing and honoring achievement. Kouzes and Posner (2006) explained that we all need others' encouragement in order to succeed. While some may consider praise and encouragement unimportant or trivial, in fact it advances people's performance, intensifies their determination, and improves their health (Kouzes & Posner, 2006).

During the interview, 62% of the participants shared content aligned with demonstrating appreciation to employees through corporate and personal gifts. One leader shared that giving kudos and appreciation to team members and members of the larger organization is one of the appreciated rituals that he and his team enjoy:

Some examples, specifically that we use that at my organization, the ways that we do that as a team, I alluded to already where we have a biweekly retrospective, and we call out kudos for each other and what each other's doing. The other thing

that we have is, we have a system called XX thanks or company thanks in which you can do the same thing and send kudos out to others outside of your team and recognize them, and that is something that's public reference level so that when it comes to their performance reviews they can point out to that and say, "Hey, I made a difference, and this is how."

Leader 8 talked about regular appreciation and acknowledgement, "Value comes on a daily basis. That thankful recognition, even the personal recognition, that was really fantastic you did great in that meeting all the way up to in this performance review." A different leader shared that she tries to put routine into her thank you:

So, what I do is every Thursday, so I call it, thank-you Thursday. I go in the system, and I look at in the past week, and I look who have I worked with who has helped me or supported me in a certain way. Or what achievements have we done, and I just go in there, and I say thank you for doing X, thank you for doing Y, and I assign points and I do that, and I do that pretty consistently. That's probably my favorite thing to do.

The same leader added that giving thanks happens on regular basis with team members alone or with other teams in the organization:

Just during meetings, I say thank you for coming prepared or thank you for putting this PowerPoint or great job on this presentation. Right, just orally. Pretty much almost every meeting that I have with my team members I think you've been [acknowledged] for something for coming prepared for great job or it was a good discussion or I'm always being thankful for their time and recognize their contributions or for doing this job. I always acknowledge the work that they

do, no matter where whether it's just between us. Whether we're meeting with other people, I'm always very conscientious of acknowledging my team members for the contributions that they've made.

There are five artifacts in this theme that were aligned with valuing and honoring achievements. These include kudos from planning meetings and weekly appreciation. One kudos included the following: "Thank you for collaborating to make our communication process super strong. Another shout-out to a team member, 'Thank you to XXX for working on the self-study implementation. It is great to have that on our internal documentation.'" Another artifact was a congratulation email for a promotion and was followed by multiple congratulation emails.

Key Findings

Interviews and artifacts were used for data analysis in this study. Twenty themes emerged from the coding and analysis of data and resulted in 20 findings. From these 20 findings, those with greater than 20% of frequencies recorded in each heart-led principle were selected as key findings. Nine key findings emerged as the key findings of this study. Table 7 represents the key findings in a summary table. The nine key findings included such themes as serving and supporting staff, building engagement and connection through trust, appreciation and transparent communication, and advancing performance and emotional well-being through growth opportunities and encouragement.

Table 7

Key Finding by Theme

Themes	Interview sources	Artifact sources	Freq.	%
Building a highly engaged team				
Working alongside staff builds strengths and engagement	7	1	37	23%
Involving staff members in projects impacting company success builds engagement	7	0	33	21%
Connecting on a personal level				
Communicating authentically builds trusting relationships with employees	7	0	35	27%
Investing time to connect with employees builds emotional connection	6	1	29	22%
Recognizing accomplishments individually and collectively builds transparency	7	0	29	22%
Maximizing employee potential				
Establishing a safe space for communication with leaders builds emotional well-being	6	1	21	36%
Positive communication builds motivation to achieve better	4	2	15	26%
Valuing and honoring achievements				
Appreciating employees via multiple modalities (events, emails, awards, rewards)	6	5	33	27%
Creating opportunities for growth and appreciation build confidence in achievement	4	2	27	22%

Key Finding 1: Working Alongside Staff Builds Strengths and Engagement

The key finding most referenced by learning and development leaders in corporate technology companies was working alongside staff builds strengths and

engagement. It was referenced 37 times with a frequency of 23% related to building a highly engaged team. According to Maxwell (2011), leaders who add value to their team members do so intentionally by serving those they lead (Bridgman, 2021). Working alongside staff and serving them and serving with them adds value to the organization and to the teams and individuals they work with. Collaborating with staff is one way to improve engagement and build strengths and trust (Bridgman, 2021; Kouzes & Posner, 2006). Working alongside and with employees rather than giving them orders from above empowers staff to be engaged with their work, their leaders, and the organization (Gebauer et al., 2008).

Key Finding 2: Communicating Authentically Builds Trusting Relationships With Employees

The second most referenced finding by learning and development leaders involved communicating authentically to build trusting relationships with employees. It was referenced 35 times with a frequency of 27%. Authentic leaders empower their followers by demonstrating that a positive reality exists and they communicate about it with their followers (Avolio & Gardner, 2005). They make real connections developed through self-awareness, trust, and transparency with the goal of creating a meaningful effect on the organization, the followers, and the authentic leaders themselves (Avolio et al., 2004). Leaders who communicate authentically offer the need to make a difference while modelling trust and authenticity (B. George, 2003).

Key Finding 3: Involving Staff Members in Projects Impacting Company Success Builds Engagement

The third most referenced theme was that involving staff members in projects impacting company success builds engagement. Both of these themes were referenced 33 times with 21% and 27% of codes respectively. Involving staff members in projects impacting company success builds engagement was aligned with building a highly engaged team. Maxwell (2002) explained that great leaders have the willingness and commitment to lead others using positive influence to mobilize people and leverage resources to achieve their goals and the greater goals of the organization.

Key Finding 4: Appreciating Employees via Multiple Modalities (Events, Emails, Awards, Rewards)

The fourth most referenced theme was appreciating employees via multiple modalities including emails, events, awards, and rewards. This theme was referenced 33 times with 27% of the codes under the valuing and honoring achievement principle. Leaders who take every opportunity to appreciate their staff will demonstrate emotional commitment to their employees (Gebauer et al., 2008). Gebauer et al. (2008) found that when leaders invest in rewarding their employees, their employees are willing to work equally hard and achieve highest levels of performance.

Key Findings 5: Investing Time to Connect With Employees Builds Emotional Connection

The fifth most referenced themes were investing time to connect with employees builds emotional connection and recognizing accomplishments individually and collectively builds transparency. This theme was aligned with connecting on a personal

level and was referenced 29 times with 22% of the codes. Leaders who invest time to connect with their employees stimulate dialogue through varied forms of communication to bring people together and closer, which allows leaders to listen to employees from all levels of the organization. It also allows employees to open up and be good listeners connected to their work and their organization (Groysberg & Slind, 2012).

Key Finding 6: Recognizing Accomplishments Individually and Collectively Builds Transparency

The sixth most referenced theme was recognizing accomplishments individually and collectively builds transparency. This theme was aligned with connecting on a personal level and was referenced 29 times with 22% of the codes. Leaders who recognize their staff accomplishments recognize individual efforts and celebrate team achievement (Kouzes & Posner, 2017). Gebauer et al. (2008) found that leaders need to show recognition and appreciation to their employees in person and publicly. They also need to tie rewards to corresponding levels of achievement (Gebauer et al., 2008).

Key Finding 7: Creating Opportunities for Growth and Appreciation Builds Confidence in Achievement

The seventh most referenced theme was creating opportunities for growth and appreciation builds confidence in achievement. It was aligned with valuing and honoring achievement and was referenced 27 times and coded 22% of the time. Gebauer et al. (2008) and Maxwell (2010), found that leaders who motivate and encourage their employees do so by inspiring their staff and strengthening them. They also know how to inspire and grow them within their organizations.

Key Finding 8: Establishing a Safe Space for Communication With Leaders Builds Emotional Well-Being

The eighth most referenced theme was establishing a safe space for communication with leaders builds emotional well-being. It was referenced 21 times with a frequency of 36% of the codes in alignment with maximizing employee potential. Kouzes and Posner (2021) posited that leaders need to cultivate their ability to focus on people and giving them feedback within a safe space. Leaders need to address the needs of their people and there's nothing better than a safe space to do that (Crowley, 2011)

Key Finding 9: Positive Communication Builds Motivation to Achieve Better

The ninth most referenced theme was positive communication builds motivation to achieve better, which was referenced 15 times under maximizing employee potential with 26% of the coded themes. Great leaders, Crowley (2011) explained, communicate “frequently and effectively” (p. 30) about the achievement of individuals on the team and how their achievement impacts the company as a whole. In the end, great leaders are known for how much they empower their people (Maxwell, 2011).

Summary

This qualitative phenomenological study was conducted to identify and describe the lived experiences of exemplary learning and development leaders in corporate technology companies who lead from the heart using Mark Crowley's (2011) four principles of leading from the heart: building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements. This chapter discussed 20 themes aligned to the four research questions related to Crowley's four heart-led principles. Themes and key findings emerged from coding

eight interviews and 19 artifacts. The analysis of these 21 findings resulted in nine key findings that described the lived experiences of exemplary learning and development leaders. For each leadership principle, data were analyzed to identify the most frequently coded themes, most frequently coded strategies within a theme and the most frequently coded strategies across themes.

Chapter V presents a final summary of this qualitative research study, including key findings, unexpected findings, conclusions, implications for action, recommendations for further research, and concluding remarks and reflections from the researcher.

CHAPTER V: FINDINGS, CONCLUSIONS, AND RECOMMENDATIONS

Overview

This phenomenological study was conducted to describe the lived experiences of exemplary learning and development leaders working in corporate technology companies who lead their organizations to achieve extraordinary results through the four principles of Crowley's (2011) heart-led leadership: building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements. The researcher interviewed eight exemplary leaders. A data analysis derived from the interviews and artifacts revealed 20 themes and nine major findings. Chapter V presents a summary of the purpose of the study and research questions including key findings, unexpected findings, conclusions, implications for action, recommendations for further research, and concluding remarks and reflections from the researcher.

Purpose Statement

The purpose of this phenomenological study was to describe how learning and development leaders lead from the heart using Crowley's (2011) four principles (building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements) to accomplish extraordinary results in their organizations.

Research Questions

Central Question

How do exemplary learning and development leaders in technology companies in California use Mark Crowley's (2011) heart-led principles of building a highly engaged

team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements to lead their teams to accomplish extraordinary results?

Subquestions

1. How do learning and development leaders lead from the heart to accomplish extraordinary results by building a highly engaged team?
2. How do learning and development leaders lead from the heart to accomplish extraordinary results by connecting on a personal level?
3. How do learning and development leaders lead from the heart to accomplish extraordinary results by maximizing employee potential?
4. How do learning and development leaders lead from the heart to accomplish extraordinary results by valuing and honoring achievements?

This qualitative phenomenological research study consisted of interviews and a review of artifacts. Eight semistructured interviews with exemplary learning and development leaders in California provided the primary data collected for this study, and together with the 19 artifacts, were used for triangulation. NVivo software was utilized to facilitate data analysis and coding of the eight interviews. To be included in this study, participants from the target population fit the description of exemplary as defined by the thematic group and faculty advisors. The criteria used for this study included eight exemplary learning and development leaders who demonstrated at least four of the following criteria; the first three were required:

1. Evidence of caring for people in the organization
2. A minimum of 3 years' experience as a corporate learning and development leader.
3. Evidence of extraordinary results

4. Articles, papers, or materials written, published, or presented at conferences of association meetings
5. Recognition by peers
6. Membership in a professional association in their field

Major Findings

The purpose of this phenomenological research study was to describe the lived experiences that exemplary learning and development leaders engage in to lead their organizations through Crowley's (2011) four heart-led principles (building a highly engaged team, connecting on a personal level, maximizing employee potential, and valuing and honoring achievements). There were three research questions related to each heart-led principle of leading from the heart that guided the analysis of the data collected. The analysis of data resulted in key findings within each heart-led principle of Crowley's heart-led principles. A total of nine key findings surfaced.

Key Findings for Research Question 1

How do learning and development leaders lead from the heart to accomplish extraordinary results by building a highly engaged team?

Key Finding 1: Working alongside staff builds strengths and engagement.

Learning and development leaders in corporate technology companies who work alongside staff build strengths and engagement. Working and collaborating with their staff, they learn to appreciate the strengths that different employees bring to their work. When staff utilize their strengths at work, they become more engaged with their work and are able to work with others with complementing strengths. Leaders who approach their team members with a service-oriented approach are likely to add value to their teams

(Maxwell, 2011). Working alongside staff and serving them and with them adds value to the organization and to the teams and individuals with whom they work. These leaders build collaborative relationships with the aim to serve alongside their staff (Greenleaf, 1998). According to Kouzes and Posner (2006), collaborating with staff is one way to improve engagement and build strengths and trust. Working alongside and with employees allows leaders to build considerate support through a relationship-based behavioral style that translates into strong, trusting working connections (Uhl-Bien, 2011). Leaders who work alongside their staff want their team members to feel supported and appreciated in the work they do (Fredericks, 2009). According to research, just visiting workers at their work site and showing sincere interest in their staff and the workplace boosts employees' engagement and confidence that their work is valuable (Gebauer et al., 2008). According to Gebauer et al. (2008), "Empathy, transparency, and visibility are the unwritten rules of interested, engaging leaders. Together, they help employees feel that leaders care about their well-being" (p. 144).

Key Finding 2: Involving staff members in projects impacting company success builds engagement. Maxwell (2002) explained that great leaders have the willingness and commitment to lead others using positive influence to mobilize people and leverage resources to achieve their goals and the greater goals of the organization. These leaders inspire their followers and the organization as a whole to take action that benefits the organization and themselves (Bass & Riggio, 2006; Northouse, 2019). Organizations and employees benefit when leaders open up about what is happening around them (J. E. Glaser, 2014). This requires authenticity, transparency, and trust, but they are indispensable to achieving a common goal (J. E. Glaser, 2014). They are

essential to propel staff to be engaged with their work and to achieve at an exceptional level (Frazier et al., 2004). Gebauer et al. (2008) explained that employees who can see the connection between what they contribute and how the company performs have better emotional connection to the company and thus more engagement.

Key Findings for Research Question 2

How do learning and development leaders lead from the heart to accomplish extraordinary results by connecting on a personal level?

Key Finding 3: Communicating authentically builds trusting relationships with employees. Leaders who communicate authentically with their employees empower their followers by demonstrating that a positive reality exists and communicate about it with their followers (Avolio & Gardner, 2005). Those leaders who communicate authentically with their followers build trusting relationships with them and motivate their teams to always contribute their best. They build trusting transparent relationships developed through real connections with the goal of creating a significant effect on the organization and all the involved stakeholders (Avolio et al., 2004). According to B. George (2003) those leaders make a difference in their organizations through communicating authentically while modelling trust and authenticity.

Key Finding 4: Investing time to connect with employees builds emotional connection. Leaders who invest time to connect with their employees stimulate dialogue through varied forms of communication to bring people together and closer, which allows leaders to listen to employees from all levels of the organization (Gebauer et al., 2008). It also allows employees to open up and be good listeners connected to their work and their organization (Groysberg & Slind, 2012). Leaders who recognize their staff

accomplishments recognize individual efforts and celebrate team achievement (Kouzes & Posner, 2017). Leaders who want to develop an emotional connection with their team members engage them with purposeful and meaningful activities. They need to know, grow, inspire, involve, and reward them (Gebauer et al., 2008). Some leaders in this study mentioned that they take intentional steps to interact with and get to know their employees. This is important and maybe one of the easiest tasks that a leader can do. Growing employees not only requires efforts from the leader but also requires the organizational infrastructure that nurtures such an environment. And perhaps inspiring employees is one of the most intangible elements of engagement and may occur as part of the connections the company develops with its employees. But inspiring leaders know how to leverage the power of the bond the employees have with the company, the sense of pride of being part of it (Gebauer et al., 2008). They also demonstrate genuine care for their well-being by generating a sense of value in the employee and their contributions. Leaders who build emotional connections also involve their employees in the opportunities to make a difference. The better their contributions are, the more they are able to give effort to the company. Finally, leaders who want to make an emotional connection with their employees need to invest in a robust and relevant rewards program, which will even pay off in performance (Gebauer et al., 2008).

Key Finding 5: Recognizing accomplishments individually and collectively builds transparency. Leaders who recognize their staff accomplishments recognize individual efforts and celebrate team achievement (Kouzes & Posner, 2017). Gebauer et al. (2008) explained that recognition is in the hands of the recognizer who could be the leader, the peer, or the customer. However for recognition to be effective, it needs to be

immediate and precise (Gebauer et al., 2008). Recognition should reflect the recognizer's attention to the work being recognized. Leaders who want high performance recognize their staff and should do it expeditiously and with a personal touch that demonstrates that they know their employees, they are transparent in dealing with them, and they care about them. That's how recognition makes an impact and doing it publicly builds transparency (Gebauer et al., 2008). One common observation among all the participants in this study is that their organizations have built a system of recognition into their environments so that leaders can take the opportunities available to them to recognize their employees and peers.

Key Findings for Research Question 3

How do learning and development leaders lead from the heart to accomplish extraordinary results by maximizing employee potential?

Key Finding 6: Establishing a safe space for communication with leaders builds emotional well-being. Kouzes and Posner (2021) suggested that leaders need to cultivate their ability to focus on people and giving them feedback within a safe space. Leaders need to address the needs of their people, and there's nothing better than a safe space to do that (Crowley, 2011). Creating a safe space to fail and learn is important for organizations as much as it is essential for individuals (Liedtka, 2018). Leaders who tolerate excellence only, set themselves for failure because they will one day miss the next level. But more importantly, leaders who don't tolerate imperfection, miss out on taking risk and the innovation that comes with the emotional well-being that tolerates mistakes (Liedtka, 2018). Leaders benefit from their organizations, their customers, and themselves when they establish a culture of safety and a culture of experimentation and

innovation (Gebauer et al., 2008). What builds emotional well-being is also feeling that the leader and the company understands and empathizes with them but also cares about them inside and outside the company walls. When the leader demonstrates flexibility to accommodate the worker's needs, they create a safe and caring environment that looks after the employee's emotional well-being as much as it does their physical and financial well-being (Gebauer et al., 2008).

Key Finding 7: Positive communication builds motivation to achieve better.

Great leaders, Crowley (2011) explained, communicate “frequently and effectively” (p. 30) about the achievement of individuals on the team and how their achievement impacts the company as a whole. In the end, great leaders are known for how much they empower their people (Maxwell, 2011). Leaders who value their team members show concern for their well-being over the sheer fulfillment of their work. This demonstrates positive communication (Maxwell, 2018). People appreciate validation, and exemplary leaders know how to communicate positively to encourage their team members to keep going in the face of challenges (Maxwell, 2018). Leaders who communicate positively know what drives their team members and they understand the types of pressures that challenge them (Gebauer et al., 2008).

Key Findings for Research Question 4

How do learning and development leaders lead from the heart to accomplish extraordinary results by valuing and honoring achievements?

Key Finding 8: Appreciating employees via multiple modalities (events, emails, awards, rewards) builds high achievement. Leaders who take every opportunity to appreciate their staff will demonstrate emotional commitment to their

employees (Gebauer et al., 2008). Research shows that employees today expect and appreciate a wide range of rewards including monetary and nonmonetary and workplace environment (Gebauer et al., 2008). According to Gebauer et al. (2008), companies today offer a work experience that is a combination of four things: pay, benefits, development, and environment. They do so because employees value an environment of appreciation that is conducive to a life-work balance. Leaders who show appreciation to their employees are more likely to reap the employees' engagement and commitment to the company and the work they do. Leaders who do not show the right kind of appreciation to the employees risk disengaging their employees (Gebauer et al., 2008).

Key Finding 9: Creating opportunities for growth and appreciation builds confidence in achievement. Gebauer et al. (2008) and Maxwell (2010) found that leaders who motivate and encourage their employees do so by inspiring their staff and strengthening them. They also know how to inspire and grow them within their organizations. Employees want to understand how they can contribute to the performance of their organization. Leaders who know how create opportunities for growth and appreciation build their employees' confidence that their leaders want them to learn how to be successful in their work (Gebauer et al., 2008). Leaders who do not engage their staff in opportunities to achieve individual and company goals risk demoralizing their employees because their contributions do not matter (Gebauer et al., 2008).

Unexpected Findings

Unexpected Finding 1: Maximizing Employee Potential

The first unexpected finding in this research study comes from the third heart-led principle of maximizing employee potential. It resulted in the fewest frequencies among the four principles with 58 frequencies of the 467 frequencies for the entire study. Only 40% of the participants talked about how positive communication builds motivation to achieve better.

While the theme of positive communication builds motivation to achieve better was referred to by only 50% of the participants, the literature supports leaders who encourage their team members to extend their skills to achieve better. Literature shows that leaders who invest in understanding their team members' strengths and weaknesses and build training solutions to address those weakness and also invest in their employees' strengths help these staff members become better contributors to the organization (Gebauer et al., 2008). According to Gebauer et al. (2008), "When employers challenge their people and develop their careers in ways that resonate with them on a personal level, increased engagement usually follows (p. 98).

Unexpected Finding 2: Creating Opportunities for Growth and Appreciation Build Confidence in Achievement

The second unexpected finding in this study comes from the fourth principle of valuing and honoring achievement. This theme was referenced by only 50% of the participants, yet it produced the second highest number of frequencies of 27. The literature supports that creating opportunities for growth builds confidence in achievement, but in this study this principle was referenced by only four of the eight

participants. Growing employees' skills and capabilities as well as their professional career paths is an important facet of effective leadership (Gebauer et al., 2008).

Establishing a culture of growth mindset and holding leaders accountable for developing and growing their own staff breeds action and encourages leaders to invest in creating opportunities for growth and development among their direct reports (Gebauer et al., 2008). Interestingly, the low frequency of referencing learning and development as a path for growth was also a noteworthy, unexpected finding in this study.

Conclusions

Through analysis of qualitative data collected in this phenomenological study, key findings led to the following conclusions describing the behaviors corporate learning and development leaders use to lead through heart-led leadership the principles of engagement, connection, potential, and achievement.

Conclusion 1: Leaders Who Work Along and Support Their Staff Build Engagement, Motivation, Transparency, and Trust

Based on the findings from this study, learning and development leaders must work alongside their staff to be able to identify their strengths and weaknesses and to be able to galvanize their strengths or support them in the most expedient way possible. Leaders who are not involved with their teams will fail in identifying when an employee needs extra help or is capable of doing extraordinary things for the team and the organization. They will also fail to build loyalty and cohesion among the team members and with the leader. Good company leaders do not needlessly exhibit authoritative behavior. According to psychologists Kim Peters and Alex Haslam (2018a), who conducted the study, *I Follow, Therefore I Lead*, leaders can benefit by showing others

that they can be followers who are willing to roll up their sleeves and actually work within the group. Peters and Haslam (2018b) also argued in the *Harvard Business Review* article of the same study that “leaders need to be seen as ‘one of us’” (para. 4). Ultimately, their analysis showed that those who identified themselves as natural leaders were unable to convince their team of it. Instead, individuals who called themselves followers were the ones who eventually rose through the ranks to become leaders (Peters & Haslam, 2018b).

Exemplary learning and development leaders who work collaboratively with their team and are present to support them and problem solve with them build engagement and transparency with their staff (Gebauer et al., 2008). Those leaders are capable of demonstrating that they care about what matters to their employees and they pay attention to what they are doing (Gebauer et al., 2008). Gebauer et al. (2008) talked about the little things that let employees know that their leadership cares about their well-being and that they are appreciated. This builds engagement. One leader explained that a leader should be in the trenches with their employees to face hurdles with them. Another leader explained that leaders who support their team can see their employees and understand their work encounters, but a leader who leads from the front is unaware of what is going on behind them. They simply cannot see issues when they arise. A leader who is there to support their team is aware of the issues their employees face and the leader faces them with his team, thus building engagement with the leader and among the team members. The result is an engaged team and improved performance and accountability (Gebauer et al., 2008). Leaders know that when their staff feel weak or alienated they will not perform at their best and may not even stick around (Kouzes & Posner, 2017).

Conclusion 2: Leaders Who Communicate Authentically With Their Team Members Build Emotional Connections and Relationships With Strong Bonds Motivated by Trust

Data from this study pointed to the paramount importance of authenticity and communication between the leader and staff. Leaders who communicate with their teams authentically listen interactively to understand the needs, challenges, and perspectives. They communicate with honesty and integrity and are open to others and willing to be vulnerable and share personal stories to build trust. Learning and development leaders who participated in this study shared that authentic communication is key to connected relationships in technology companies. Communication, active listening, and being present were all themes that leaders insisted are essential for building connected, trusting relationships between leaders and team members. Leaders must be “more human, be more authentic, and be more emotional” according to Dr. Sabin Einwiller (as cited in Atkinson, 2021, para. 6). The emotional connection helps people connect more with the leader and the organization. According to the study, “For internal communication, appreciative, dialogue-oriented communication is key—because it strengthens the emotional bond between employees and their organization. And then, when employees are effectively committed to their organization, they are also more engaged in their job” (Atkinson, 2021, para. 6). Kouzes and Posner (2017) also suggested that communication is central to team performance, but connecting with employees does not have to be restricted to the workplace. In fact, connecting with staff outside the workplace improves communication and builds authentic connections. One leader who participated in this research study reported that the number one responsibility of people leaders is to lead the

people, and engage and connect with them. It is clear from the interviews that exemplary leaders focus on communication with their team and when they communicate; it is authentic, clear and strengthens the bonds between the team (Gebauer et al., 2008; Kouzes & Posner, 2017).

Conclusion 3: Leaders Who Establish a Safe Space and Communicate Positively With Their Followers Increase Creativity and Innovation.

Based on findings from this study, leaders who establish a safe space for communication build trusting relationships that stimulate creativity, risk taking, and innovation. Leaders who communicate positively with their team members encourage them to be fully present and to share their perspective without reservations. Without a safe space for communication and work, leaders will fail to propagate an out-of-the-box thinking environment, and exceptional performance will be squashed with groupthink mentality. Leaders who establish an emotional connection understand that it is the single most powerful motivational force in our brain, it helps people feel included, appreciated, and safe. Leaders who create relationship stay accessible, responsive, and engaged, specifically in times of stress. This is what creates an emotional connection (Gershfeld, 2016). Exemplary learning and development leaders who participated in this study reported that creating safe spaces for them and their employees to communicate was an essential part of communication with their team. These leaders encouraged their staff to be vulnerable by being vulnerable themselves and by modeling effective communication that encourages their employees to be authentic and clear. Kouzes and Posner (2021) suggested that leaders need to focus on people by giving them feedback within a safe space. Like one of the participants in this study who encouraged his

employee to move to another team and to rest assured that if he decided that the new place was not good for him, he would be able to come back to his position and his previous team. Creating a safe space to fail and learn is also important for both the individuals and their organizations. Leaders benefit from their organizations, their customers, and themselves when they establish a culture of safety and a culture of experimentation and innovation (Gebauer et al., 2008). Leaders who understand and empathise with their team members care about them but inside and outside the company walls. Creating a safe and caring environment that offers the employee's emotional well-being as much as it does their physical and financial well-being demonstrates leaders' flexibility to accommodate their employees' needs (Crowley, 2011; Gebauer et al., 2008; Ulrich & Woodson, 2011). Moreover, exemplary leaders empower their people by communicating effectively and frequently with their team members (Crowley, 2011; Maxwell, 2011). Leaders who value their team members show concern for their well-being over the sheer fulfillment of their work. This demonstrates positive communication (Maxwell, 2018). Leaders who want to encourage their team members to thrive in the face of challenges communicate positively and validate them (Maxwell, 2018). They understand what drives their team members and communicate positively to support it (Gebauer et al., 2008).

Conclusion 4: Corporate Learning and Development Leaders Who Show Appreciation for Their Staff Will Boost Engagement and Motivate Higher Achievement

Data from this research study for learning and development leaders who showed appreciation for their staff demonstrated that the work of their staff has value that they

recognize, harness, and reward. Leaders who fail to appreciate their staff fail to energize their teams by implying that high performance is not necessary. Learning and development leaders who participated in this study had a lot to share about appreciating their staff. Most shared that they took no credit for setting up the structure and the system of appreciation at their organizations. They benefited from that system and used it to share their appreciation with their team members. One leader added that it all boils down to a simple thank you that you can share with your employees whenever they earn it. However, it requires that the leader be appreciative of the employee and thus create opportunities to show gratitude that is meaningful and impactful. Leaders who recognize and appreciate the accomplishments of employees will boost engagement and motivate higher achievement. According to Mook (2021), good leaders quickly learn that acknowledgement and appreciation are the greatest positive motivators and important tools to help team members overcome uncertainty. When leaders are grateful for their teams and their staff, it takes almost no effort and exerts no burden (Gebauer et al., 2008), but their employees are more likely to be more engaged and committed to the company and the work they do.

Conclusion 5: Creating Opportunities for Growth Increases Productivity and Engenders' Loyalty

Findings from this study revealed that leaders who created opportunities for growth within their organizations did so by championing education throughout the organization. These leaders created a culture inspired by a motivation to question the status quo and the ability to improve it (Gebauer et al., 2008). It is recommended that

leaders do the following to achieve maximum and continuous growth in their organizations:

1. Use a collective approach to learning and development that encompasses the entire organizations and speaks to the leadership commitment to continuous learning across every level of the organization.
2. Continuously challenge their high performers for personal growth to stay productive, aspiring, and motivated to grow within the organization.
3. Motivate action through accountability by encouraging managers and holding them accountable for the growth and development of their own staff.
4. Create an ecosystem of experimentation and innovation by ensuring a safe environment for failure. Leaders must accept imperfection as a path for engagement and growth.

Implications for Action

Implication 1

Successful leaders must create a connection with their employees by working alongside them to achieve organizational goals. Using the four principles of heart-led leadership in organizations should be a deliberate act and a matter of organizational strategy aimed at creating engagement, connection, and appreciation of potential and performance. Organizations that achieve success rarely arrive at that accidentally and so incorporating an organization-wide heart-led philosophy should be woven into the fabric of the organization. From strategy to goals to training and execution, heart-led leadership should be an integral part of every aspect of the organization. Arrangements should be made to provide learning and development leaders with the mentorship and coaching they

need to lead their teams with heart and to follow the principles of heart-led leadership. The mentor or coach will act as a confidant who can listen and discuss different perspectives, solutions, and feedback, and advise and provide varied opportunities for self-reflection and evaluation for the leader. It is recommended that leaders initiate the following actions to create a connection and succeed in accomplishing organizational goals.

1. Involve employees in the development of the organizational mission, vision, and values. Engage all stakeholders in establishing the vision and values and hold themselves and others accountable for implementing them in their work.
2. Use their expertise in working as a team member in projects.
3. Empower team leaders to make key decisions about projects.
4. Establish specific times when the team receives an organizational update and opportunity to ask questions and make suggestions.
5. Provide feedback about accomplishments of the team and their contribution.
6. Take responsibility for crises or problems that occur and work collaboratively to correct them.

Implication 2

Organizations must advance the implementation of a heart-led strategy into their learning and development organizations by investing in training the rest of the organization in best practices of leading from the heart into their everyday practices. The outcome of this research should be shared with learning and development organizations specifically, and all other members of the organization, to share the findings of this

research. Each organizational leader working with the human resource team must develop a learning and development program that

1. Includes professional development goals in all employee evaluations.
2. Shares the leader's goals for growth.
3. Develops a path of professional development open to all employees that can be used as a promotion pipeline.
4. Facilitates conversations with employees about needs for growth in practice and improvement on a quarterly basis.
5. Develops a coaching program that supports each employee to be mentored as a pathway for growth and development.
6. Provides each employee with stretch goals that support development of skills and knowledge.

Implication 3

Learning and development leadership preparation programs like Amazon Pathways, Google's Project Oxygen, and Apple University must incorporate the teachings of heart-led practices so that they become the universal best practice for leadership in every facet of the organization. By investing in applying heart-led practices in the practices of exemplary leaders of learning and development, their practices will impact and shape the learning programs they produce to coach and mentor other leaders in the organization, thus acting as the cheerleaders of heart-led leadership across the organization. But as more and more leaders embrace leading from the heart practices into their daily experiences with their teams, it should become obvious that incorporating

heart-led practices into leadership training programs is the next best thing for organizations.

Implication 4

Organizations must publicly showcase corporate learning and development leaders who demonstrate heart-led best practices. Exemplary leaders who adopt heart-led leadership best practices should not live in isolation. While their efforts may have been born of individual initiative, they should not stay as such. These practices should be showcased and shared with other leaders across the organization who can benefit from their experiences and their results. Learning and development leaders are best equipped to share their experiences with others, and what worked for their teams can be modeled for other entities in the organization to emulate. Learning and development leaders who lead from the heart must contribute to leadership summits at their organizations with stories from experiences and strategies they have developed or adopted to lead from the heart. Successful learning and development leaders must coach other leaders in the organization on the principles, best practices, and strategies of using heart-led leadership.

Recommendations for Future Research

Recommendation 1: A Phenomenological Study Focusing on Leaders Across the Organization

It is recommended that a phenomenological study be conducted with a larger number of learning and development leaders. Results of such studies can be better used for generalization of results. Once these studies are completed, studies should consider studying other leaders in the organization.

Recommendation 2: A Phenomenological Study Focusing on Leaders in Corporate Organizations of Small and Medium Sizes

A recommendation is made to conduct research studies of learning and development leaders in small- and medium-sized technology companies. Results from these studies will consider whether, for example, a system of appreciation and gratitude not provided by the organization will still result in learning and development leaders choosing to appreciate their employees using a variety of methods ranging from a verbal thank you and ending with bonus or a promotion and increase in pay.

Recommendation 3: A Phenomenological Study Focusing on Leaders in Corporate Organizations in Other States

It is recommended that a study or studies be conducted to focus on learning and development leaders in technology companies in other states across a variety of states in the North, South, West, East, center, and mid areas of this country. Results from this study will inform the research community of the effect of the organizational culture versus other factors on the adoption of heart-led leadership. Once these studies are completed, it would be interesting to compare results from different regions in the country to verify how heart-led principles are practiced in other parts of the country.

Recommendation 4: A Mixed Methods Study Focusing on Corporate Learning and Development Leaders Practices to Maintain Emotional Well-Being During Times of Stress

A recommendation is made to conduct a mixed methods or Delphi research study of heart-led practices of learning and development leaders in their corporate organization to maintain emotional well-being during times of stress. Then team members of these

leaders would be surveyed on their experiences with heart-led practices. Results will be obtained and compared, and conclusions and recommendations provided for further action. It is recommended that these studies focus on each principle of the heart-led leadership model.

Recommendation 5: A Phenomenological Research Study Focusing on Men Versus Women in Learning and Development Leaders in Technology Corporate Organizations

It is recommended that a meta-analysis study be done to identify and describe the heart-led differences in practices between men and women learning and development leaders in corporate technology companies in California.

Recommendation 6: A Meta-Analysis Research Study Focusing on Learning Leaders in Corporate Versus Educational Organizations

A recommendation is made to conduct a meta-analysis to describe the heart-led strategies that learning and development leaders utilize in corporate technology organizations versus leaders in educational organizations. The study would compare middle managers in corporate organizations with principals in elementary, charter, or high schools.

Recommendation 7: A Delphi Research Study Focusing on a Panel of Leaders From Different Technology Organizations Big, Small, and Everything in Between

A recommendation is made to conduct a Delphi study with a panel of experts in leadership to identify the strategies leaders use to lead from the heart or to develop positive relationships and achieve extraordinary results.

Concluding Remarks and Reflections

Throughout my career, I have encountered all kinds of leaders. Some were heartless and conniving, and others were reckless and disengaged. This research study was an opportunity to sit with leaders I looked up to. Fortunately, heart-led leadership is not only available in prescriptive books on leadership. As I engaged with my leaders, one after another, it was a pleasant surprise to engage with leaders who lived and experienced leadership as I read in the literature. I am amazed by the sheer resemblance of stories to each other. Caring for their team members, showing genuine authenticity in how they cared about providing the best learning opportunities for their team, and celebrating their success were all rewarding. The leaders shared stories of attention, trust, and pure affection and care for their employees. The interviews offered a window into the psyche of celebrated leaders who themselves have won awards for their compassionate, heart-led leadership practices with their teams. Fortunately, the interviews have captured the sheer pleasure these leaders have cast on their profession by embracing genuine care for their teams and engagement with them.

As I look at technology organizations across California, I cannot help but think that one day I will be a heart-led leader working in one of these organizations as a leader, and not only as an individual contributor benefiting from an environment where leaders are full of passion for their work and compassion for their teams. As I continue to grow with my career, I will always be the leader who values engagement with my team members. I value supporting them and working alongside them with understanding and the motivation to support innovation. Learning and development is the heart of every organization, and this heart must flow healthy, vibrant blood across the organization from

its top leaders to its teams and to every individual contributor in the organization.

Powered with this realization and the implications of heart-led leadership, I will aim to empower every member of the enterprise through creative learning opportunities that are meant to engage stakeholders and connect with them. I think it is wonderful to work with people you trust who have your best interests at heart as much as you have the best interests of the organization at your heart. Heart-led leadership, it seems, is alive and well in technology companies where the bottom line is a combination of the work and the people who do the work. I am amazed by the sheer resemblance of stories I heard from these leaders. Caring for their team members, showing genuine authenticity in how they cared about providing the best learning opportunities for their team, and celebrating their success was all rewarding. Yet none of them said, “Here at my company, we are trained to lead like this.” Heart-led leadership should never be a personal initiative. Heart-led leadership should become a matter of organizational strategy.

After experiencing Mark Crowley’s (2011) principles of leading from the heart at work in technology organizations of all places, I am convinced that heart-led leadership is focused on providing leaders with the courage to be vulnerable, the strength to be trustworthy, and the wisdom to listen to others with all their heart. I am also filled with hope that as we spend more than half of our life at work, we make work a source of pleasure and gratification for our hearts and minds while also providing for our families.

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APPENDICES

APPENDIX A

Synthesis Matrix

	Business Context	Coaching/Leader	Authentic Leadership	Servant Leadership	Transformational Leadership	Relational Leadership	Building a Highly Engaged Team	Institutional Design Strategy	Competitive Advantage	Leadership Competence	Maximizing Employee Potential	Valuing and Encouraging Achievements	Exemplary Leadership	Knowledge Worker	Competitive Advantage	Management Challenges	Innovation	Adaptability	Learning Imperative	Valueability	Building Trust	Institutional Design	Institutional Design Leaders	Carroll Effect	Psychological Safety	Design Thinking	Extraordinary results
1	Covey, S. R. (2012). <i>The 4 Imperatives of Great Leaders: Leaders, Great Leaders, Great Teams, Great Results</i> . <i>Bolinda Audio</i> .							X											X	X	X						
2	Campbell, K., & Scherer, B. A. (2014). Major movements in instructional design: Online distance education. <i>145-150</i> .	X					X	X	X						X	X	X	X				X	X				
3	Crawley, M. C. (2013, December 25). <i>Employee engagement isn't getting better and Gallup shows the surprising reasons why</i> .	X					X		X						X	X											
4	Crawley, M. C. (2011). <i>Lead from the Heart: Transformational Leadership for the 21st Century</i> . <i>HubSpotPress</i> .	X			X		X		X	X	X				X	X	X	X	X	X						X	
5	Dass, G. G., & Picken, J. C. (2009). Changing roles: Leadership in the 21st century. <i>Organizational Dynamics</i> , 38(2).	X			X				X					X	X		X	X									
6	Drucker, P. F. (1997). <i>Knowledge-worker productivity: The biggest challenge California management sees</i> . <i>41(2)</i> , 29-34.	X						X	X			X	X	X	X	X	X			X					X		
7	Drucker, P. F. (2007). <i>Management challenges for the 21st century</i> . <i>Revised</i> .	X							X					X	X	X		X									
8	Farallon, D. (2015). <i>A Mind-Method: Study of How Elementary Principals Build Trust With Staff Using Weisman's Five Domains of Trust Model</i> .						X	X	X	X	X						X	X	X					X	X		
9	Friedman, J. L., & Mandelbaum, M. (2012). <i>That used to be us: How America fell behind in the world it invented and how we can regain back the initiative</i> .	X		X	X	X								X	X	X	X	X	X		X			X			
10	Grenier, R. K. (1977). <i>Servant leadership: A journey into the nature of business power and creation</i> . <i>Metaphor N.Y. Pagan Press</i> .		X	X	X																						
11	Robson, J., Lowman, D., & Gordon, J. (2008). <i>Closing the engagement gap: How great companies unlock employee potential for superior results</i> . <i>Pitman</i> .	X					X			X				X	X		X										
12	Goff, M. J. (2017). <i>The Art of Connection: 7 Relationship-building skills Every Leader Needs Now</i> . <i>New World Library</i> .							X											X								
13	George, B. (2010). <i>True north: Discover your authentic leadership</i> . (Vol. 143). <i>John Wiley & Sons</i> .		X		X					X					X		X										

	Business Context	Coaching/Leader	Authentic Leadership	Servant Leadership	Transformational Leadership	Relational Leadership	Building a Highly Engaged Team	Institutional Design Strategy	Competitive Advantage	Leadership Competence	Maximizing Employee Potential	Valuing and Encouraging Achievements	Exemplary Leadership	Knowledge Worker	Competitive Advantage	Management Challenges	Innovation	Adaptability	Learning Imperative	Valueability	Building Trust	Institutional Design	Institutional Design Leaders	Carroll Effect	Psychological Safety	Design Thinking	Extraordinary results	
1	Ashby, E. (2008). <i>Creativity and innovation: The leadership dynamics</i> . <i>Journal of Strategic Leadership</i> , 1(1), 32-45.									X					X	X	X	X									X	
2	Ashbaugh, M. L. (2013). <i>Expert instructional designer voices: Leadership competencies critical to global practice and quality online learning designs</i> . <i>The Quarterly Review of Distance Education</i> , 14(2), 97-118.	X					X			X									X			X	X					
3	Ashbaugh, M. L. (2013). <i>Personal leadership in practice: A critical approach to instructional design innovation work</i> . <i>TechTrends</i> , 57(5), 74-84.	X					X			X					X	X	X					X	X					
4	Ashbaugh, M. L., & Pilla, A. A. (2014). <i>Improving instructional design processes through leadership thinking and modeling</i> . In <i>Design in Educational Technology</i> (pp. 223-247). <i>Springer</i> .	X					X			X					X	X	X					X	X					
5	Avolio, B. J., & Gardner, W. L. (2005). <i>Authentic leadership development: Getting to the root of positive forms of leadership</i> . <i>The leadership quarterly</i> , 16(3), 115-138.		X	X	X	X				X					X	X												
6	Avolio, B. J., Walumbwa, F. O., & Weber, T. J. (2009). <i>Re-examining the components of transformational and transactional leadership using the Multifactor Leadership Questionnaire</i> . <i>Journal of Occupational and Organizational Psychology</i> , 72(4), 441-464.	X		X	X					X	X				X	X												
7	Bass, J., Capozzi, M. M., & Davidson, J. (2001). <i>Leadership and innovation</i> . <i>McKinsey Quarterly</i> , 4, 36.	X			X	X	X	X		X					X	X			X					X	X			
8	Bass, B. M. (2008). <i>The new handbook of leadership: Theory, research, and managerial applications</i> (4th ed.). <i>New York, NY: Free Press</i> .	X			X					X					X													
9	Bass, B. M., & Avolio, B. J. (1993). <i>Transformational leadership and organizational culture</i> . <i>Public administration quarterly</i> , 1, 12-31.				X									X	X	X	X											
10	Bass, B. M., & Riggio, R. E. (2006). <i>Transformational leadership: Psychological</i> .				X					X	X			X					X					X				
11	Bertone, D., Grant, A., & Horn, M. (2012). <i>Leadership in the 21st century</i> . <i>McKinsey Quarterly</i> , 1, 1-6.	X	X	X			X				X	X	X	X	X	X	X	X										

	Business Changes	Coaching Leader	Adaptive Leadership	Servant Leadership	Transformational Leadership	Relational Leadership	Building a Highly engaged Team	Instructional Design Strategy	Competitive a Personal Level	Leader competence	Maximizing employee Potential	Valuing all Human Abilities	Exercising Leadership	Knowledge Worker	Competitive Advantage	Management Challenges	Innovation	Adapting to AI	Learning Imperative	Diversity	Building Trust	Instructional Design	Instructional Design Leaders	COVID 19 Effect	Psychological Safety	Deep Thinking	Extracurricular results
1	Bennis, W. (2007). The challenges of leadership in the modern world: Introduction to the special issue. <i>American psychologist</i> , 62(1), 2.	X							X		X			X	X	X	X	X									
13	Bass, H. V. (2017). 7 Principles of Transformational Leadership - Create a Model of Passion, Innovation, and Growth. In.			X			X								X												
14	Berni Grayberg, J. L., Jose Price, J. Y. and Chang, (2018). A leader's guide to corporate culture. Harvard Business Review.	X						X						X	X												
15	Brown, B. (2015). Daring greatly: How the courage to be vulnerable transforms the way we live, love, parent, and lead. <i>Penzance</i> .														X			X	X					X			
16	Brown, B. (2018). Dare to lead. New York, NY: Random House		X				X	X								X		X	X					X			
17	Bond, J., & Deakin, K. (2018). Instructional Design: Study of a Blending Scope of Practice. <i>Online Journal of Distance Learning Administration</i> , 21(4), 44-47.					X									X		X				X	X					
18	Brown, T. (2016). Leaders Can Change Creativity Into Competitive Advantage. <i>Harvard Business Review</i> .	X						X					X	X	X	X		X	X				X	X			
19	Brown, T., & Katz, B. (2011). Change by Design. <i>Journal of Product Innovation Management</i> , 24(2), 391-393.	X						X	X				X	X	X			X					X	X			
20	Burn, T. J., & Dugan, N. (2011). An analysis of employee recognition Practices on human resource practices. <i>The International Journal of Human Resource Management</i> , 18(6), 716-730.		X	X	X					X					X												
21	Burns, B., Hughes, M., & By, R. T. (2018). Reimagining organizational change leadership. <i>Leadership</i> , 14(2), 141-158.	X		X		X		X			X	X	X	X	X	X	X	X									
22	Chodkowski, J., Gardner, J. W., & Topa, A. (2020). Instructional Design Leadership and Management Competencies: Job Description Analysis. <i>Online Journal of Distance Learning Administration</i> , 23(1).	X					X								X	X					X	X					
23	Colla, B., & Maragyas, A. (2003). Merrill plus: Blending corporate strategy and instructional design. <i>Educational Technology</i> , 33(2), 54-59.	X					X		X							X	X				X	X					

	Business Changes	Coaching Leader	Adaptive Leadership	Servant Leadership	Transformational Leadership	Relational Leadership	Building a Highly engaged Team	Instructional Design Strategy	Competitive a Personal Level	Leader competence	Maximizing employee Potential	Valuing all Human Abilities	Exercising Leadership	Knowledge Worker	Competitive Advantage	Management Challenges	Innovation	Adapting to AI	Learning Imperative	Diversity	Building Trust	Instructional Design	Instructional Design Leaders	COVID 19 Effect	Psychological Safety	Deep Thinking	Extracurricular results
1	Glaser, J. E. (2016). <i>Conversational intelligence: How great leaders build trust and get extraordinary results</i> . Routledge.								X		X								X	X						X	
36	Greenleaf, R. K. (1998). <i>The power of servant leadership</i> . Favers, Brevort/Kashner Publishers.		X							X		X	X	X							X			X			
38	Greenleaf, R. K. (2002). <i>Servant leadership: A journey into the nature of business power and greatness</i> (5th ed.). New York, NY: Paulist Press		X							X					X												
40	Graybeard, B., & Zbind, M. (2012). <i>Talk, Inc.: How trusted leaders use conversation to power their organizations</i> . Harvard Business Press				X			X		X					X	X		X	X					X			
41	Hakonen, M., & Sundstrom, A. (2012). Building trust in high-performing teams. <i>Technology Innovation Management Review</i> , 2(6).		X					X		X						X					X	X	X				
42	Hirsche, H. J., & Hirsche, J. (2013). Intergenerational collisions and leadership in the 21st century. <i>Journal of Intergenerational Relationships</i> , 11(7), 284-303.	X						X			X		X	X		X											
43	Hogan, B. (202, October 15, 2020). <i>The Future of Work Is Uncertain</i> . Harvard Business	X						X					X	X	X	X	X	X				X	X		X		
44	Harvard, S. (2015). <i>Connected leadership: How to build a more agile, customer-driven business</i> . Pearson UK.	X			X		X	X							X	X								X			
45	Keenan, J. M., & Pomor, B. Z. (2001). <i>The Jones: How academic administrators work to exemplify leadership</i> (Vol. 111). John Wiley & Sons										X									X	X	X					
46	Keenan, J. M., & Pomor, B. Z. (2014). <i>The Five Practices of Exemplary Leadership: United Kingdom</i> . John Wiley & Sons	X		X			X	X			X		X	X	X		X			X							
47	Keenan, J., & Pomor, B. (2012). <i>The leadership challenge: How to make extraordinary things happen in organizations</i> (5th ed.). San Francisco, CA				X						X				X						X						
48	Keener, H., Villamor, J., & Asanin, H. (2019). <i>Innovation leadership: Best practice recommendations for promoting employee creativity, voice, and knowledge</i> . <i>American Business Horizons</i> , 62(1), 65-74.	X									X	X			X	X	X		X	X							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	
		Business Changes	Coaching Leader	Authentic Leadership	Service Leadership	Transformational Leadership	Relational Leadership	Building a Highly engaged Team	Instructional design strategy	Commitment as a Personal Level	Leader competence	Maximizing employee Potential	Valuing All Employees	Employee's Autonomy	Employee's Leadership	Knowledge Worker	Competitive Advantage	Management Challenges	Innovation	Adaptability	Learning Imperative	Flexibility	Building Trust	Instructional Design	Instructional Design Leaders	Covid 19 Effect	Psychological Safety	Design Thinking	Extraordinary results	
1	Macey, W. H., & Schneider, B. (2008). The meaning of employee engagement. <i>Industrial and organizational Psychology</i> , 1(1), 3-36.						X								X	X			X											
90	Maxwell, J. C. (2010). <i>Everyone Communicates, Few Connect: What the Most Effective People Do Differently</i> . Thomas Nelson.		X		X				X	X			X	X		X	X			X	X					X				
91	Maxwell, J. C. (2014). <i>Developing the leader within you 2.0</i> . HarperCollins Leadership.								X							X	X	X												
92	Wolcott, A., Kegan, S. F., Johnson, P., & Johnson, P. (2009). <i>Becoming a resonant leader: Develop your emotional intelligence, renew your relationships, master your effectiveness</i> . Harvard Business Review.																													
93	Preussner, S. (2009). <i>The art of reward of rewarding excellence in education</i> . Retrieved 28 September 2020, from http://www.educationdata.com/review/issue/03_04_10_04.html																													
94	Potter, B. Z. (2017). <i>5 Practices of Exemplary Leadership</i> . Success Online.	X			X	X				X	X					X	X			X	X					X				
95	Handell, R., & Luthans, J. (2014). <i>Five ways why companies are using design thinking</i> . <i>Strategy & Leadership</i> .	X								X							X					X	X	X		X	X			
96	Rees, C., Allen, K., & Gashy, M. (2013). <i>Employee voice and engagement: connections and consequences</i> . <i>The International Journal of Human Resource Research</i> .						X	X	X	X		X				X														
97	Baner, R. A. (2007). <i>A history of instructional design and technology</i> . <i>Trends and issues in instructional design and technology</i> , 2, 17-24.	X								X						X							X	X						
98	Saks, A.M., (2016). <i>Antecedents and consequences of employee engagement</i> . <i>Journal of managerial psychology</i> .						X	X														X				X				
99	Shya, F. (2009). <i>Meaning skills for 21st century learning</i> . <i>Phi Delta Kappan</i> , 90(9), 610-614.	X			X			X		X						X	X	X		X										
100	Jermola, M., F. Rindt, K. J., & Embava, A. B. (2013). <i>The effects of employee engagement, pay, and benefits on job satisfaction: cross country evidence</i> . <i>Journal of Business and Economics</i> , 4(3), 1-11.										X	X	X				X					X				X				

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC		
		Business Changes	Coaching Leader	Authentic Leadership	Service Leadership	Transformational Leadership	Relational Leadership	Building a Highly engaged Team	Instructional design strategy	Commitment as a Personal Level	Leader competence	Maximizing employee Potential	Valuing All Employees	Employee's Autonomy	Employee's Leadership	Knowledge Worker	Competitive Advantage	Management Challenges	Innovation	Adaptability	Learning Imperative	Flexibility	Building Trust	Instructional Design	Instructional Design Leaders	Covid 19 Effect	Psychological Safety	Design Thinking	Extraordinary results		
1	Uhl-Bron, M. (2011). <i>Relational leadership theory: Exploring the social processes of leadership and organizing</i> . <i>Leadership, practice, and organization</i> , 7, 2-19.	X				X				X					X	X															
90	Wright, K. C. (2011). <i>Learning Design: Training Courses for the Corporate Environment: What Have Been the Experiences of Instructional Designers?</i> . <i>Instructional Design</i> .	X					X	X			X	X	X	X	X	X	X	X	X	X			X	X							
91	Yoshida, I. (2021). <i>5 Reasons why learning and development is so important for organizations in 2021</i> . <i>Kahuna Online</i> .						X	X			X	X						X	X			X	X	X							
92	Ward, D.M. (2013). <i>Learning leaders require business acumen: Instructional design professionals at the corporate leadership table</i> . <i>Academic Leadership: Journal on Student Research</i> , 7(1), 6.	X					X	X			X	X	X	X	X	X	X	X	X				X	X							

APPENDIX B

Invitation Letter for Potential Participants

September 2021

Dear Learning and Development leader,

I am a doctoral candidate in UMASS Global Doctor of Education in Organizational Leadership program in the School of Education. I am conducting a qualitative phenomenological research study to describe how corporate learning and development leaders lead from the heart using Mark Crowley's four principles (building a highly engaged team, connecting on a personal level, maximizing employee potential and valuing and honoring achievements) to accomplish extraordinary results in their organizations.

I am asking for your assistance in the study by participating in an interview which will take approximately 60 minutes and will be set up at a time convenient for you through a virtual setting. If you agree to participate in the interview, you can be assured that it will be completely confidential. No names will be attached to any notes or records from the interview. All information will remain in locked files, accessible only to the researchers. No employer will have access to the interview information. You will be free to stop the interview and withdraw from the study at any time. You are also encouraged to ask any questions that will help you understand how this study will be performed and/or how it will affect you. Further, you may be assured that the researchers are not in any way affiliated with your organization. The research investigator, Randa Jad-Moussa, is available at rmoussa@mail.umassglobal.edu or by phone at (xxx-xxx-xxxx), to answer any questions or concerns you may have. Your participation would be greatly appreciated.

Sincerely,

Randa Jad-Moussa, Doctoral Candidate, Ed.D.

APPENDIX C

Interview Guide: Heart Thematic Interview Script

I would like to start by thanking you for sharing your valuable experiences with me. I know your time is precious and I appreciate your willingness to participate in this interview. Making this personal connection with you will be of great benefit to my research and I truly appreciate your contribution to this study.

My name is Randa Jad-Moussa and I am an instructional designer for UMass Global University. I'm a doctoral candidate at UMASS Global in the area of Organizational Leadership. I'm a part of a team conducting research to describe how exemplary leaders lead from the heart using Mark Crowley's four principles (building a highly engaged team, connecting on a personal level, maximizing employee potential and valuing and honoring achievements) to accomplish extraordinary results in their organizations.

Our team is conducting 112 interviews with leaders like yourself. Our hope is that the information we gather will provide a clear picture of what exemplary leaders do to lead their organizations through the use of Crowley's four principles and our work will add to the body of research currently available.

Informed Consent (START RECORDING to obtain verbal consent)

Prior to this interview you received information concerning the purpose of the research, a copy of the interview questions, Brandman University's Participant's Bill of Rights, and the Informed Consent form. After reviewing the protocols, you were offered an opportunity to ask questions concerning the research and the consent process. At that time, you provided verbal consent to be a participant in the interview. For purposes of verifying your consent would you again provide a verbal yes as to your consent that will be included in the recording of this interview. Thank you.

I will now begin the interview. When our interview is complete, I will stop the recording and conclude our interview session. After your interview is transcribed, you will receive

a copy of the complete transcripts to ensure I have accurately captured your thoughts and ideas. Following your review and approval of the transcription, the data will be analyzed along with the data I have collected from the other respondents.

I would like to remind you that any information that is obtained in connection to this study will remain confidential. I will be looking for themes that are present across all of the interviews. In reporting out the data, I will refer to respondents by pseudonyms and not by name, work location, or employer. The digital recording will be erased three years after the publication of the dissertation in accordance to the strict guidelines set forth by the Brandman University Institutional Review Board (BUIRB) whose major function is to protect respondents.

Please remember that anytime during this process you have the right to stop the interview. If you do not understand the questions being asked, please do not hesitate to ask for clarification. Is there anything I can clarify before we begin?

Okay, let's get started, and again, thanks so much for your time.

Interview

Before we begin our interview questions, I want to review the purpose of this study and the four research questions that will be the focus of our interview today.

Purpose Statement:

The purpose of this phenomenological study was to describe how exemplary leaders (superintendents, principals, city managers, police chiefs, corporate leaders, military leaders, etc.) lead from the heart using Mark Crowley's four principles (building a highly engaged team, connecting on a personal level, maximizing employee potential and valuing and honoring achievements) to accomplish extraordinary results in their organizations.

Research Questions:

1. How do exemplary leaders lead from the heart to accomplish extraordinary results by building a highly engaged team?

2. How do exemplary leaders lead from the heart to accomplish extraordinary results by connecting on a personal level?
3. How do exemplary leaders lead from the heart to accomplish extraordinary results by maximizing employee potential?
4. How do exemplary leaders lead from the heart to accomplish extraordinary results by valuing and honoring achievement

The interview questions will be preceded by a definition of the Crowley principle that is connected to those questions. The first principle is found in research question one,

Building a Highly Engaged Team.

Definition:

Building a highly engaged team is using strategies that help people become enthusiastically invested in and dedicated to work they believe is significant, meaningful, and challenging, where relationships are built on emotional connection and shared vision, and where values and commitment are based on personal strengths and interests aligned with organizational goals (Crowley, 2011; George & Stevenson, 1988; Rees, Alfes & Gatenby, 2013; Senge, Lichtenstein & Kaeufer, 2007).

Interview Questions:

1. How do you develop a team that is dedicated to their collective work?

Probe: Please share a time when you supported one of your teams that was having difficulty.

2. How do you make work meaningful for your team?

Probe: Please share an example?

3. How do you develop relationships on your team that are built on emotional connections?

- Probe: How did the development of relationships lead to a shared vision?

We now move to our second principle from research question #2, **Connecting on a Personal Level.**

Definition:

Connecting on a personal level is seeing and acting on behalf of others and authentically communicating with the intention of adding value driven by humility, concern, and love (Brown, 2015; Crowley, 2011; Hayward, 2015; Maxwell, 2010).

Interview Questions:

4. How do you communicate authentically with members in your organization?
Probe: Please share a time when this was important to the organizations' success.
5. Please describe how your humility helps you in your work. Probe: How has this developed personal connections with employees?
6. How do you show concern and love for your employees? Probe: Please share an example of how this made a difference in the performance of your employees.

Our third principle from research question #3 is **Maximizing Employee Potential.**

Definition:

Maximizing employee potential is igniting emotional drivers by promoting human well-being while proactively strengthening, teaching, and building people toward high achievement (Crowley, 2011; Burnett & Lisk, 2019).

Interview Questions:

7. How do you promote emotional well-being in your organization?

Probe: Please share a time when you experienced the benefits of promoting emotional well-being in your organization.

8. How do you create an environment that motivates staff members to high levels of achievement? Probe: Please provide a specific example.
9. How do you strengthen and build employees in a way that supports high achievement?
Probe: Please share a story of the specific strategy that you used that led to high achievement.

Our fourth principle found in research question #4 is **Valuing and Honoring Achievements**.

Definition:

Valuing and honoring achievements is praising, acknowledging, recognizing, and appreciating positive accomplishments as an expression of care through monetary and/or nonmonetary rewards, which may lead to increased job satisfaction (Dugas & Brun, 2008; Tessema, Ready & Embaye, 2013; Posamentier, 2008; Crowley, 2011).

Interview Questions:

10. Valuing and Honoring Achievements is important to inspiring employees to a higher level of satisfaction. How do you acknowledge employees' achievements at work?
Probe: Can you elaborate on how you recognize their achievements?
11. How do you ensure that your employees see that their work is valued?
Probe: Describe specific non-monetary and/or monetary practices that you use for this purpose.
12. Can you share an example of when you provide an expression of care for an employee?
Probe: Please tell me a little more about that.

This concludes the interview questions. I would like to again thank you very much for your time. If you would like, when the results of our research are known, we will send you a copy of our findings.

APPENDIX D

Informed Consent

Information About: A Phenomenological Study of corporate learning and development leaders Leading from the Heart

Responsible Investigator: Randa Jad-Moussa

The following will be included in the Interview Protocol:

You are being asked to participate in a thematic research study conducted by Randa Jad-Moussa, a doctoral student from UMASS Global, a nonprofit affiliate of the University of Massachusetts. The purpose of this phenomenological study was to describe how corporate learning and development leaders lead from the heart using Mark Crowley's four principles (building a highly engaged team, connecting on a personal level, maximizing employee potential and valuing and honoring achievements) to accomplish extraordinary results in their organizations.

I understand that:

- a) There are minimal risks associated with participating in this research. I understand that the Investigators will protect my confidentiality by keeping the identifying codes and research materials in a locked file drawer that is available only to the researchers.
- b) The possible benefit of this study to me is that my input may help add to the research regarding the strategies that exemplary leaders use to create personal resiliency.
- c) If you have any questions or concerns about the research, please feel free to contact the researcher using the information provided in the invitation to participate.
- d) My participation in this research study is voluntary. I may decide to not participate in the study and I can withdraw at any time. I can also decide not to answer particular questions during the interview if I so choose. I understand that I may refuse to participate or may withdraw from this study at any time without any negative consequences. In addition, the investigator may stop the study at any time.
- e) No information that identifies me will be released without my separate consent and that all identifiable information will be protected to the limits allowed by law. If the study design or the use of the data is to be changed, I will be so informed and my consent re-obtained. I understand that if I have any questions, comments, or concerns about the study or the informed consent process, I may write or call

the Office of the Vice Chancellor of Academic Affairs, UMASS GLOBAL, at 16355 Laguna Canyon Road, Irvine, CA 92618, (949) 341-7641.

If you have any questions or concerns about the research, please feel free to contact Randa Jad-Moussa 760 rmoussa@mail.umassglobal.edu or by phone at (xxx) xxx-xxxx or Dr. Keith Larick (Dissertation Chair) at larick@mail.umassglobal.edu

I acknowledge that I have received a copy of this form and the “Research Participant’s Bill of Rights.” I have read the above and understand it and hereby consent to the procedure(s) set forth.

Signature of Participant **Date**

Signature of Principal Investigator **Date**

APPENDIX E

UMASS Global Research Participant's Bill of Rights



UMASS GLOBAL UNIVERSITY INSTITUTIONAL REVIEW BOARD

Research Participant's Bill of Rights

Any person who is requested to consent to participate as a subject in an experiment, or who is requested to consent on behalf of another, has the following rights:

1. To be told what the study is attempting to discover.
2. To be told what will happen in the study and whether any of the procedures, drugs or devices are different from what would be used in standard practice.
3. To be told about the risks, side effects or discomforts of the things that may happen to him/her.
4. To be told if he/she can expect any benefit from participating and, if so, what the benefits might be.
5. To be told what other choices he/she has and how they may be better or worse than being in the study.
6. To be allowed to ask any questions concerning the study both before agreeing to be involved and during the course of the study.
7. To be told what sort of medical treatment is available if any complications arise.
8. To refuse to participate at all before or after the study is started without any adverse effects.
9. To receive a copy of the signed and dated consent form.

10. To be free of pressures when considering whether he/she wishes to agree to be in the study.

If at any time you have questions regarding a research study, you should ask the researchers to answer them. You also may contact the UMASS GLOBAL Institutional Review Board, which is concerned with the protection of volunteers in research projects. The UMass Global Institutional Review Board may be contacted either by telephoning the Office of Academic Affairs at (949) 341-9937 or by writing to the Vice Chancellor of Academic Affairs, UMASS GLOBAL, 16355 Laguna Canyon Road, Irvine, CA, 92618.

APPENDIX F

Audio Recording Consent

Prior to this interview you received information concerning the purpose of the research, a copy of the interview questions, UMAss Global University's Participant's Bill of Rights, and the Informed Consent form. After reviewing the protocols, you were offered an opportunity to ask questions concerning the research and the consent process. At that time, you provided verbal consent to be a participant in the interview. For purposes of verifying your consent would you again provide a verbal yes as to your consent that will be included in the recording of this interview. Thank you.

I will now begin the interview. When our interview is complete, I will stop the recording and conclude our interview session. After your interview is transcribed, you will receive a copy of the complete transcripts to ensure I have accurately captured your thoughts and ideas. Following your review and approval of the transcription, the data will be analyzed along with the data I have collected from the other respondents.

I would like to remind you that any information that is obtained in connection to this study will remain confidential. I will be looking for themes that are present across all of the interviews. In reporting out the data, I will refer to respondents by pseudonyms and not by name, work location, or employer. The digital recording will be erased three years after the publication of the dissertation in accordance to the strict guidelines set forth by the UMAss Global University Institutional Review Board (UMGIRB) whose major function is to protect respondents.

Please remember that anytime during this process you have the right to stop the interview. If you do not understand the questions being asked, please do not hesitate to ask for clarification. Is there anything I can clarify before we begin?

Okay, let's get started, and again, thanks so much for your time.

APPENDIX G

Field Test Observer's Feedback Reflection Form

Thank you for observing the field test used to validate the interview questions for this multiple case study. As a valuable participant, your answers to the following questions will be used to make necessary adjustments to the Leadership Competency Protocol, the interview questions, and the interview process.

1. How long did it take to conduct the interview? Do you believe this time was appropriate or should be adjusted?
2. What were your personal feelings while giving the interview? At what times did you feel comfortable, nervous, or confused?
3. How would you improve the clarity of the interview instructions, and how could the Leadership Competency Protocol be improved so both the interviewer and the interviewee are better prepared?
4. At what times during the interview, did you believe the process to run effectively. At what times during the interview, do you believe there were problems?
5. Do you have any suggestions on how to improve the questions, the process, or the overall experience?

APPENDIX H

Field-Test Participant Feedback Form

While conducting the interview you should take notes of their clarification request or comments about not being clear about the question. After you complete the interview ask your field test interviewee the following clarifying questions. **Try not to make it another interview; just have a friendly conversation.** Either script or record their feedback so you can compare with the other two members of your team to develop your feedback report on how to improve the interview questions.

Before the brief post interview discussion, give the interviewee a copy of the interview protocol as you review the following feedback questions. If their answers imply that some kind of improvement is necessary seek their clarification.

1. How did you feel about the interview? Do you think you had ample opportunities to describe what you do as a leader when working with your team or staff?
2. Did you feel the amount of time for the interview was ok?
3. Were the questions by and large clear or were there places where you were uncertain what was being asked? *If the interviewee indicates some uncertainty, be sure to find out where in the interview it occurred.*
4. Can you recall any words or terms being asked about during the interview that were confusing?
5. And finally, did I appear comfortable during the interview... (I'm pretty new at this)?

Remember, the key is to use common, conversational language and very user friendly approach. Put that Emotional Intelligence to work 😊

NOTE: Red font is for your eyes and support info only. Field test participant only receives or is asked questions 1-5.

APPENDIX I

Field Test Interview Feedback Reflection Form

We students at UMass Global University so appreciate your help in our designing the best survey we can. Your participation is crucial to the effort.

Below are some questions that I would appreciate you answering after completing the survey. Your answers will assist me in refining both the directions and the survey items.

This will allow me to make edits to improve the survey prior to administering to all of the potential study participants.

You have been provided with a paper copy of the survey, just to jog your memory if you need it. Thanks so much.

1. How many minutes did it take you to complete the survey, from the moment you opened it on the computer until the time you completed it? _____

2. Did the portion up front that asked you to read the consent information and click the agree box before the survey opened concern you at all? ____
If so, would you briefly state your concern _____

3. The second paragraph of the introduction had this question: “*What are those things you see in your leader or experience in your leader that promotes personal or organizational meaning?*” Did that question help clarify for you the purpose of this research? _____

4. Was the Introduction sufficiently clear (and not too long) to inform you what the research was about? ____ If not, what would you recommend that would make it better? _____

5. Were the directions to Part 1 clear, and you understood what to do? ____
If not, would you briefly state the problem _____

6. Were the brief descriptions of the 6 choices prior to your completing the 30 items clear, and did they provide sufficient differences among them for you to make a selection? ____ If not, briefly describe the problem _____

7. As you progressed through the 30 behaviors in which you gave a rating of 1 through 6, if there were any items that caused you say something like, "*What does this mean?*" Which item(s) were they? Please use the paper copy and mark those that troubled you? Or if not, please check here: _____

*** Yellow highlights indicate the need to customize for your specific survey.**

APPENDIX J

CITI Certification



Completion Date 22-May-2020
Expiration Date N/A
Record ID 36579864

This is to certify that:

Randa Jad-Moussa

Has completed the following CITI Program course:

Human Subjects Research (Curriculum Group)
Social-Behavioral-Educational Researchers (Course Learner Group)
1 - Basic (Stage)

Not valid for renewal of certification through CME. Do not use for TransCelerate mutual recognition (see Completion Report).

Under requirements set by:

Brandman University



Verify at www.citiprogram.org/verify/?w140a630c-ee37-40b4-9d40-48ccdf2aa73b-36579864